



MONTGOMERY COUNTY PUBLIC SCHOOLS

REAL ESTATE MANAGEMENT TEAM STRATEGIC PLAN FY 2014-2019

Department of Facilities Management

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FY14-19 REAL ESTATE MANAGEMENT STRATEGIC PLANNING

REM Functions

1. Acquire and surplus property
2. Oversee State Clearinghouse process
3. Negotiate and manage leases (Joint Occupants, Cell towers, Land leases, agricultural leases, MCPS as tenant, holding schools)
4. Project and track real estate revenue and expenses
5. Report and track MCPS real property assets
6. Support the cost of administrative office space
7. Perform property management services for leased facilities (addressing user and neighbor issues)
8. Monitor and analyze enterprise fund performance
9. Oversee/manage Adopt-A-Field program
10. Track Artificial Turf fund
11. Manage RFP processes for Adopt-A-Field (AAF), turf fields, MCPS leased spaces, and joint occupants
12. Manage/oversee Cell tower lease process
13. Oversee cell tower revenue sharing reconciliation
14. Participate in the MCPC Design Review Committee
15. Support DFM administrative, fiscal, and unit operational functions
16. Respond to information requests from internal and external customers
17. Coordinate with other public agencies for the benefit of schools and communities
18. Participation in regional land use master planning

- Manage
- Support
- Money/Fund/Financial
- Perform
- Respond
- Project
- Participate
- Coordinate
- Monitor
- Report

Customers

- Principals/schools
- Childcare providers
- Other JO tenants
- Other DFM Units
- DFM Director
- Sports organizations
- Cell tower providers
- Montgomery County citizens
- County, State, and local agencies

Stakeholders

- BOE
- ICB
- Utility agencies
- MCPC
- COO
- Montgomery County Gov't agencies
- State agencies
- School staff and community

REM Mission Statement

The Real Estate Management Team advocates for the real estate interests of Montgomery County Public Schools through effective management practices, and identifying revenue and cost reduction opportunities. The REM supports the DFM mission in providing a high quality learning and work environment for students and staff.

REM Vision Statement

The Real Estate Management Team will be a leader in providing real property solutions, information, and a strategic plan for addressing MCPS future space needs.

Values

Learning

We believe our work is focused on the success of all MCPS students and employees. Learning is achieved through creativity, innovation, focus, goal setting, teamwork, and lifelong learning for adults.

Therefore, we will model our commitment to achieve continuous improvement, foster professional learning communities and cross-training to develop a high-performing workforce, and provide professional growth opportunities and support for all employees.

Relationships

We believe that meaningful collaboration between DFM units, REM staff, business partners, and communities is a vital ingredient of our unit's success and make the department more effective in fulfilling our mission. Strong partnerships are built on trust and open and honest communication.

Therefore, we will know and seek to understand the perspectives, experiences, and needs of our customers, build strong, mutually supportive relationships with our customers, stakeholders, and partners. We commit to use interest-based and other collaborative methods to identify and achieve mutually agreed upon goals.

Respect

We believe that respectful behavior builds goodwill and trust that leads to high performing teams and each individual staff member's and partner's contributions add value to the quality of our services.

Therefore, we will model civility and professionalism in all interactions and encourage open and honest communications, provide opportunities for customers, stakeholders, and partners to voice their opinions, actively recognize individuals' contributions and progress, and approach others with the belief that they have positive intentions.

Excellence

We believe that setting and maintaining high standards, providing high-quality sustainable products and services, and having actively engaged and committed employees leads to excellence in service and success for all students.

Therefore, we will use resources effectively and efficiently to meet and exceed standards, be accountable, measure performance, explore innovative and new products, practices, and solutions. We will invest in our employees' professional development.

Equity

We believe that every person has value; the racial, ethnic, and cultural diversity of our organization provides a wealth of valuable perspectives, and racial and cultural barriers exist and must be acknowledged and eliminated.

Therefore, we will embrace the diversity of our workforce, value individuals, be open to different perspectives, and proactively address racial and cultural inequities.

Integrity

We believe that integrity provides the necessary foundation for long term relationships of trust and organizational success.

Therefore, we will foster honesty and strong moral values, uphold high ethical standards, and model whole and undivided unity among team members with internal consistency.

SWOT

Strengths

- Organization
- Communication
- Responsiveness to needs and requests to customer needs
- Strong and supportive leadership
- Willingness to work within the team effectively
- New innovative ideas
- Employee insightfulness and resourcefulness
- Strong team image
- Diverse team knowledge and experience
- Willingness to learn MCPS processes and understand them
- Student data projections are very reliable
- Gain greater exposure within the school system
- Trendsetters

Weaknesses

- Dispersion of the school system and MCPS REM portfolio information
- Lack of guiding principles for future REM transactions
- Lack of processes that link REM throughout the organization
- Lack of structure to guide other DFM activities as related to real property issues
- Lack of coordination between departments
- Lack of understanding/appreciation of customer needs
- Various/duplicate databases, lack of data management and verification of data
- No system or methods for projecting and sharing MCPS workforce data
- Job descriptions in a state of transition
- Undefined role and function within DFM (translating overall organizational objectives into areas of impact on the real estate portfolio)
- Lack of contact with our customers (tenants, school administrators)
- Lack of training and knowledge of Financial Management function
- No space standards or space planning for central services
- Vacant holding schools
- No long-term real estate strategy

Opportunities

- Favorable market conditions for acquiring real estate
- Vacant holding schools
- Cell tower revenue opportunities
- Relationship building with public agencies
- Offsetting cost through the Adopt-A-Field program
- Standardization of MOUs and other agreements
- Working with DOC to revisit improvement procurement process
- New child care regulations
- Working with other divisions

Threats

- Increasing operations and utility costs
- Limited tenant space in schools
- Communities' opposition to cell towers
- Increasing enrollment
- Lack of developable school sites and MCPS operation sites
- Unfavorable market conditions for acquiring real estate
- Lack of control of REM funds
- Political pressures
- Cumbersome processes
- Weak cooperation between public agencies
- Lack of openness to new ways of doing business/cooperation within DFM
- Lack of funds to address tenant building issues
- Turf field replacement fund management

Strategic Issues

How do we manage growth and contraction?

How do we manage outdated real estate assets?

What is the blueprint for moving forward?

How do we control/reduce occupancy costs?

What is the extent of our real estate data?

Space studies, employment projections?

What are possible future MCPS operating scenarios?

How do we benchmark improvements?

What is the guiding principle/philosophy for space management?

How has MCPS organization changed over the years; structure, decentralization, collaborative, and experimental?

How do we maximize our human resources and develop a plan for professional growth?

How do we switch from day-to-day operations to a planning mentality?

1. REM organizational image and recognition
2. Data compilation and collaborative management with other DFM units
3. Standards, policies, procedures such as; vacating and occupying holding schools and functioning within a lease space.
4. Cost containment/revenue enhancement
5. Strategy/master plan for managing real estate
6. Cooperation and collaboration throughout DFM
7. Professional development and planning

Assumptions

1. REM will continue working under budget and resource constraints
2. Operating expense will continue to increase
3. Compliance with new child care policy
4. Takes time to build consensus around change

Strategic Goals

1. Customers' and stakeholders' have an awareness and understanding of the unit's mission, functions, and business processes.
2. All team members have professional growth plans that support career development and the REM team mission.
3. A strategic real estate management plan has been developed for MCPS operations.
4. Data sources have been consolidated and a system created for accessing information across divisions and units.
5. Opportunities to increase revenue and decrease expenses throughout MCPS real property portfolio have been identified and pursued to fruition.
6. An improved system for managing Joint Occupancy and Closed School spaces and tenants has been implemented.

Strategies

- 1) Foster relationships and develop outreach efforts with MCPS customers, tenants, and service providers (SG#1, SG#6)
- 2) Implement a team development process and encourage REM team members to self-evaluate and seek direction within the Professional Growth System. (SG#2)
- 3) Communicate need/benefits of a long-term Real Property plan to senior management and obtain their support. (SG#3, SG#5, SG#6)
- 4) Coordinate with other DFM units to implement a cyclical process for reviewing and improving consistency, alignment, integration of DFM processes and functional relationships. (SG#1, SG#4)
- 5) Continuously evaluate opportunities for revenue growth and expenditure reductions. (SG#5, SG#6)
- 6) Prioritize and allocate use of available resources.

Supporting Objectives

- 1) Conduct school/site visits periodically to meet in person with customers and stakeholders. (S1)
- 2) Conduct periodic unit/team member evaluations as required by the PGS to identify areas for professional development and learning opportunities. (S2)
- 3) Research process for developing a long-term real estate strategy/plan and identify associated actions, costs, obstacles, and benefits. (S3)
- 4) Review and update internal processes to align with stakeholders, partners, and customer requirements ensuring efficiency and effectiveness. (S1, S4, S6)
- 5) Regularly survey MCPS real property portfolio and real estate market to identify revenue opportunities. (S5)
- 6) Develop meaningful customer feedback system to identify areas of improvement and measure satisfaction. (S1, S4)

Action Plan

- 1) Schedule four monthly site visits until every MCPS owned property has been visited. Meet with occupants as necessary. (SO#1)
- 2) Develop list of schools and occupied properties visited and track dates of visits to ensure all properties are visited periodically. (SO#1)
- 3) Meet with individual team members to review individual and team goals. (SO#2)
- 4) Develop PDP for each staff member. (SO#2)
- 5) Review past MCPS space planning efforts to identify information to support Real Estate strategic planning effort. (SO#3)
- 6) Define scope of real estate strategic plan and identify steps, obstacles, and benefits of plan. (SO#3)
- 7) Present information regarding strategic real estate plan to senior management for consideration. (SO#3)
- 8) Meet with Long-range Planning staff and other MCPS stakeholders annually to identify surplus space within existing and closed schools. Confirm construction planning schedules and other possible impacts to utilizing/leasing surplus space. (SO#3, SO#5)
- 9) Create and maintain list of potential available space on MCPS property. (SO#3, SO#5)
- 10) Develop survey of current MCPS tenants to receive feedback and establish benchmarks. (SO#6)