



DRAFT

AGENDA

Strategic Real Estate Management Services

Dates: Thursday, June 14th to Friday, June 15th

Overview

As part of the wider Strategic Real Estate Management Services plan improvement, four main initiatives have been identified. These include:

- 1) database evaluation
- 2) improved property management processes
- 3) improved transaction management processes
- 4) Metro Planning (State occupied space in Columbia, Greenville, and Charleston)

After discussing the initial project launch, each initiative will be explored individually.

Meeting objectives

- Gain strategic alignment on overall mission and vision
- Document stakeholder objectives
- Revise, align and integrate the four initiatives
- Schedule consequent meetings
- Establish required data and participants

Thursday, June 14 th		
Time	Topic / Activity	Notes
2:00 – 3:30p	Project Launch Alignment	
2:00 – 2:30p	Welcome and objectives	
2:30-3:00p	Voice of Stakeholder	<ul style="list-style-type: none"> • What problems exist with current situation and processes? • Understand client's goals
3:00-3:30p	Overview of initiatives and project approach	
3:30-3:45p	<i>Break – 15 minutes</i>	

Project Initiative Breakout Sessions		
3:45 – 5:15p Initiative 1: Technology Evaluation		
3:45-4:00	Objective	
4:00-4:45	Step-by-step walkthrough <ul style="list-style-type: none"> • Step 1: Gap Assessment • Step 2: Data Blueprint • Step 3: Recommended Architecture • Step 4: Roadmap and Training 	Explain each step and the corresponding deliverables, necessary stakeholders, and objectives
	Scheduling and revision	Plan consequent meetings, and add clarification or revision where need be
3:45-5:15p Initiative 4: Metro Planning <i>separate but simultaneous w/ initiative 1</i>		
2:45-3:00p	Objective	
3:00-3:45	Step-by-step walkthrough <ul style="list-style-type: none"> • Step 1: Operating Assessment • Step 2: Existing Conditions Assessment • Step 3: Metro Plan Development 	Explain each step and the corresponding deliverables, necessary stakeholders, and objectives
3:45-4:15	Scheduling and revision	Plan consequent meetings, and add clarification or revision where need be
Friday June 15		
9:00 – 10:30a Initiative 2: Property Management Process Improvement		
9:00-9:15a	Objective	
9:15-10:00	Step-by-step walkthrough <ul style="list-style-type: none"> • Step 1: Baseline State and Data Evaluation • Step 2: Best-Practices / Optimal Model Definition • Step 3: Opportunity and Recommendations 	Explain each step and the corresponding deliverables, necessary stakeholders, and objectives
10:00-10:30	Scheduling and revision	Plan consequent meetings, and add clarification or revision where need be
10:30-10:45a	BREAK – Break / Lunch	
1:00-2:30p Initiative 3: Transaction Management Process Improvement		
1:00-1:15p	Objective	
1:15-2:00	Step-by-step walkthrough <ul style="list-style-type: none"> • Step 1: Project Set-up and Discovery • Step 2: Process Launch Workshop • Step 3: Best Practices Incorporation • Step 4: Tools and Templates • Step 5: Lean Process Design Workshop • Step 6: Finalize Process 	Explain each step and the corresponding deliverables, necessary stakeholders, and objectives
2:00-2:30	Scheduling and revision	Plan consequent meetings, and add clarification or revision where need be

Workshop Participants

- Carla Griffin, Budget and Control Board
- Steve Elliot, Budget and Control Board
- Marcia Adams, Budget and Control Board
- Participants for four workstream meetings

- Herman Bulls, Jones Lang LaSalle
- John Fetz, Jones Lang LaSalle
- Jennifer Hill, Jones Lang LaSalle
- Charles Small, Diversified Development Inc.
- Scott Redabaugh, Jones Lang LaSalle
- Douglas Gottschalk, Jones Lang LaSalle
- Ryan Fetz, Jones Lang LaSalle

South Carolina Stakeholder groups:

- South Carolina Budget & Control Board
- South Carolina state agencies
- South Carolina taxpayers