



Air Force Housing Privatization Portfolio Management Annual Site Assessments



AIR FORCE CENTER FOR ENVIRONMENTAL EXCELLENCE Information Sheet

The overarching goal of the Annual Site Assessment program is to ensure the success of a housing privatization project from the perspectives of both the Project Owner team and the Air Force team. Annual Site Assessments evaluate project success from a developmental, operational, and financial perspective. When all project aspects are being operated and managed in accordance with project transactional documents, service members and their families are provided quality, affordable housing. The Portfolio Manager* is the Air Force authority responsible for overseeing the Portfolio Management Team that conducts the Annual Site Assessments.

The Annual Site Assessment is a comprehensive property evaluation that consists of the following elements:

- **Property and Facilities Inspection**—a visual inspection of the property and the privatized housing units with attention to property safety and maintenance procedures
- **Property Team Management Survey**—a survey of maintenance response, labor cost, employee performance, and resident satisfaction
- **Property Team Communication Evaluation**—an evaluation of the property team's communication techniques and reporting methods

In addition to ensuring effective project management practices, Annual Site

Assessments also provide an opportunity for enhanced communication among Air Force project administrators, the Project Owner, the property manager, and the residents. Because site visits involve personnel from the MAJCOM and Portfolio Management Team as well as the Air Force installation, Project Owner, and property manager under assessment, these meetings reunite all levels of the privatization program. Annual Site Assessments consequently provide an ideal opportunity to identify future program goals and improvements.

Model Annual Site Assessment Agenda:

- **Site Tour**—Visit privatized property to survey neighborhood layout and community amenities
- **Housing Tour**—Visit new and/or renovated housing to assess the physical and aesthetic condition of privatized facilities
- **Maintenance Tour**—Survey housing maintenance, visit maintenance facilities and employees
- **Meeting with Base Housing Management Office**—Address privatization procedures (e.g., compliance testing and financial documentation) and discuss future improvements based on current experiences with privatized properties
- **Meeting with Property Management**—Discuss property management and administrative practices

* The Air Force Housing Privatization Portfolio Manager is the Air Force Center for Environmental Excellence, which executes duties with the assistance of Jones Lang LaSalle, the current Portfolio Management support consultant.



- **Goal and Program End Review with all Involved Parties**—Discuss compliance and facilitation issues, and set additional goals for future program development and/or improvement

At each step of the Annual Site Assessment, the Portfolio Management Team completes a detailed observation checklist. As illustrated in the model Housing Tour checklist below, participants rate targeted aspects of the privatized housing project according to the evaluation key. By the end of the visit, assessors will have completed a series of evaluations including a Site Tour checklist, a Housing Tour checklist, a Property Management checklist, a Maintenance checklist, and an Administrative checklist. An analysis of the data gathered from these observation checklists reflects a picture of overall project health and highlights individual areas that need improvement.

MODEL ANNUAL SITE VISIT OBSERVATION CHECKLIST				
Function/Activity Evaluated: Housing Tour				
Base Name:				
Contractor Name:				
Date:				
	E	G/S	NI	UnS
Renovated Family Housing Unit				
Site—Grading/Drainage/Erosion/Foundation Integrity				
Hardscape—Driveway/Walks/Swales/Retaining Walls/Fence/Patio				
Landscaping—Turf/Shrubs/Trees/Ground Covers/Planter Beds				
Exterior Elements—Roof/Siding/Windows/Lighting/Garage-Car Port/Entrances				
Interior Building Elements—Walls/Floors/Ceilings/Doors/Windows/Lighting				
Interior Elements—Bathrooms: Tubs/Showers/Vanities/Sinks/Commodes/Ventilation/Lighting				
Interior Elements—Kitchen: Cabinets/Sink/Appliances				
Interior Elements—HVAC/Plumbing/Electrical/Fire Safety				
Newly Built Family Housing Unit				
Site—Grading/Drainage/Erosion/Foundation Integrity				
Hardscape—Driveway/Walks/Swales/Retaining Walls/Fence/Patio				
Landscaping—Turf/Shrubs/Trees/Ground Covers/Planter Beds				
Exterior Elements—Roof/Siding/Windows/Lighting/Garage-Car Port/Entrances				
Interior Building Elements—Walls/Floors/Ceilings/Doors/Windows/Lighting				
Interior Elements—Bathrooms: Tubs/Showers/Vanities/Sinks/Commodes/Ventilation/Lighting				
Interior Elements—Kitchen: Cabinets/Sink/Appliances				
Interior Elements—HVAC/Plumbing/Electrical/Fire Safety				
Evaluation Key: E=Excellent, G/S=Good/Satisfactory, NI=Needs Improvement, UnS=Unsatisfactory				

PORTFOLIO MANAGEMENT SERIES

This Information Sheet is one in a series on the subject of Portfolio Management. In February 2001, the Air Force Center for Environmental Excellence (AFCEE) was designated as the Air Force Housing Privatization Portfolio Manager. AFCEE executes its Portfolio Management responsibilities with the assistance of Jones Lang LaSalle (JLL), the current Portfolio Management support consultant.

From transaction closing through project closeout, the Portfolio Manager acts in oversight, monitoring, and guidance roles on behalf of the Air Force to protect the Government's interests. (Project closeout is at the conclusion of the transactional performance period, assets are disposed of and the project is closed out.)

FOR MORE INFORMATION

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