ADS Chapter 517

Washington Real Property Acquisition and Management

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ADS 517 – Washington Real Property Acquisition and Management
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Table of Contents

517.1 OVERVIEW 4

517.2 PRIMARY RESPONSIBILITIES 4

517.3 POLICY DIRECTIVES AND REQUIRED PROCEDURES.... 5

517.3.1 Acquisition of Federally-Owned or Leased Space 5

517.3.2 Acquisition of Privately-Owned Space 6

517.3.3 Workspace Principles 7
517.3.3.1 General Principles 7
517.3.3.2 Planning Principles 8

517.3.4 Workspace Allocation and Standards 8

517.3.5 Designated Restricted and Unrestricted Space 10

517.3.6 Workspace Changes 10

517.3.7 Workspace for Non-Direct Hire Employees 11

517.3.8 Space Cost Recovery 12

517.3.9 Joint Asset Management Plan 12

517.3.10 Congressional Notification 13

517.4 MANDATORY REFERENCES 13

517.4.1 External Mandatory References 13

517.4.2 Internal Mandatory References 14

517.4.3 Mandatory Forms 14

517.5 ADDITIONAL HELP 14
517.5.1 Optional Forms 15

517.6 DEFINITIONS 15

ADS Chapter 517 – Washington Real Property Acquisition and Management

517.1 OVERVIEW
Effective Date: 03/24/2016

This chapter provides the Agency's policy directives and required procedures for the acquisition and management of real property to meet USAID's domestic space requirements. It establishes the standards, guidelines, and procedures for the management of space and serves to promote, establish, and maintain efficient and effective space utilization. This chapter does not apply to the leasing or management of real property in field Missions or property leased by USAID-funded contractors.

517.2 PRIMARY RESPONSIBILITIES
Effective Date: 03/24/2016

a. The **Director, Bureau for Management, Office of Management Services (M/MS)**

(1) Serves as the Agency's Senior Real Property Officer (SRPO) and is responsible for the development and implementation of an Asset Management Plan to comply with requirements of **Executive Order (E.O.) 13327**;

(2) Develops Agency strategies and policies for space planning and utilization in USAID/Washington (USAID/W); and

(3) Leases privately-owned space for the Agency when no suitable government-owned or leased space is available through the General Services Administration (GSA) to meet Agency needs.

b. The **Chief, Bureau for Management, Office of Management Services, Headquarters Management Division (M/MS/HMD)**

(1) Monitors the utilization of space in USAID/W and determines the feasibility and validity of requirements for additional space; and

(2) Coordinates with GSA to develop the program of requirements for new space needs.

c. **Bureaus and Independent Offices (B/IOs)** identify short- and long-term space requirements and coordinate with M/MS/HMD on the utilization of assigned space.

d. The **Office of the General Counsel (GC)** ensures that terms and conditions of Occupancy Agreements with GSA or USAID direct leases for privately-owned space are in compliance with all applicable laws and regulations.

e. The **Bureau for Management, Office of the Chief Financial Officer (M/CFO)** ensures that the financial terms and conditions of Occupancy Agreements or USAID

direct leases for privately-owed space are in compliance with federal and USAID financial management regulations.

f. The **Office of Legislative and Public Affairs (LPA)** reports to Congress prior to the obligation of operating expense or capital investment funds for the construction, purchase, or long-term lease of offices where the cost will exceed $1,000,000.

g. The **Bureau for Management, Office of the Chief Information Officer (M/CIO)** provides the technical expertise and planning to meet information technology requirements in USAID/W space.

h. The **Office of Security (SEC)** implements physical security programs for USAID's real estate portfolio.

517.3 POLICY DIRECTIVES AND REQUIRED PROCEDURES

517.3.1 Acquisition of Federally-Owned or Leased Space

Effective Date: 03/24/2016

In accordance with **Section 636(a)(1) of the Foreign Assistance Act**, USAID is authorized to use appropriated funds to rent buildings and space in buildings in the United States. As a matter of Agency policy, USAID will use the expertise of GSA and first seek space in U.S. government-owned or government-leased properties to satisfy headquarters space requirements. USAID will only use its independent leasing authority when

(1) Suitable GSA-controlled space is not available;

(2) GSA cannot acquire suitable privately-owned space for the Agency; and

(3) It is more efficient and cost effective for the Agency to rely upon its own leasing authority.

Under all circumstances, when USAID undertakes space acquisition, GSA will be consulted as an expert advisor.

The required procedures for the acquisition of government-owned or leased space through GSA are as follows:

a. M/MS/HMD will coordinate with designated staff in GSA's Public Building Service to develop a program of requirements to meet the Agency's needs when space is required for headquarters operations. Guidelines for working with GSA to acquire space are outlined in the **GSA Customer Guide to Real Property**.

b. M/MS/HMD will prepare the GSA request for space using the **Standard Form 81 (SF-81) - Request for Space**. The SF-81 must be signed by the Director of M/MS on behalf of the Agency and cleared by the Assistant Administrator for Management (AA/M).

c. GSA's pricing structure for federally-owned and leased space is outlined in the **GSA Pricing Desk Guide**. The acceptance of GSA space and the financial terms must be formalized in an Occupancy Agreement (OA). The OA must include a complete statement of the financial terms of the agreement and the responsibilities of GSA and the Agency.

The Director of M/MS must sign Occupancy Agreements on behalf of the Agency. The Occupancy Agreement must be signed prior to the commencement of alterations or the award of lease agreements. Occupancy Agreements must be cleared by the following prior to execution:

- Administrator (A/AID);
- Assistant Administrator for Management (AA/M);
- The Office of the General Counsel (GC); and the
- Chief Financial Officer (M/CFO).

d. M/MS must obligate funds for rent payments in accordance with financial terms in the Occupancy Agreements and monthly bills issued by GSA.

e. M/MS/HMD must review monthly rent bills and resolve discrepancies with GSA.

517.3.2 Acquisition of Privately-Owned Space

Effective Date: 03/24/2016

When USAID's needs cannot be met with GSA-controlled government-owned or leased space, USAID may decide to directly lease space with a commercial entity. The Director of M/MS will determine the feasibility of acquiring privately-owned space. The AA/M must approve initiating the acquisition process for a direct lease with the clearance of GC. The following requirements must be met:

a. USAID must acquire leases in accordance with applicable federal requirements and in consultation with GSA as an expert advisor.

b. The leases must be acquired on the most favorable basis for the Federal Government, with consideration to maintenance and operational efficiency and at charges consistent with prevailing market rates for comparable facilities in the community.

c. Each lease agreement must contain a provision that makes all USAID financial obligations subject to the availability of funds appropriated annually by Congress. The designated leasing officer or his/her designee must confer with GC regarding such provisions prior to signing any lease agreements on behalf of the Agency.

d. USAID will follow the budget scorekeeping rules for leases as identified in appendices A and B of **OMB Circular A-11**.

e. Only the designated leasing officer or his/her designee may contact real estate brokers or agents, lessors, offerors, or potential offerors concerning current or potential space leased, or to be leased, for the purpose of making oral or written representations, commitments, or agreements with respect to the following:

- Terms of occupancy of particular space,
- Tenant improvements,
- Alterations and repairs, or
- Payment for overtime services.

f. The Director of M/MS will sign lease agreements on behalf of the Agency and consult with GSA and GC as appropriate. The lease agreement must be cleared by the following prior to execution:

- Administrator (A/AID);
- Assistant Administrator for Management (AA/M);
- The Office of the General Counsel (GC); and the
- Chief Financial Officer (M/CFO).

517.3.3 Workspace Principles

Effective Date: 03/24/2016

The Agency will provide sufficient and suitable workspace in accordance with the standards described by GSA in **41 CFR 102**. The following principles will be applied to space planning, allocation, and management.

517.3.3.1 General Principles

Effective Date: 03/24/2016

Health, safety and security: The workspace will provide for the health and well- being of all individuals using the space and ensure that accessibility, safety, and security needs are met.

Sense of place: The workspace should convey the right image for the Agency, both among employees as well as external stakeholders.

Acoustic comfort: The workspace should be configured and constructed to ensure appropriate speech privacy, consistent with the recommendations put forth in **GSA Sound Matters**.

Spatial equity: The workspace should be configured and used in a way that ensures a balance of privacy and interaction for all, provides equitable access to daylight and views, and supports mobile work for all eligible employees.

517.3.3.2 Planning Principles
Effective Date: 03/24/2016

Efficiency and effectiveness: All workspaces should be planned in accordance with the Agency's long range Washington real estate strategy. The overall occupancy of space will conform to a Utilization Rate (UR) of 160 usable square feet per person or less.

Workspace zoning and separation of incompatible uses: The workspace should be configured to cluster similar activities and provide appropriate separation between dissimilar activities, particularly when planning for noisy/quiet areas.

Suitability for purpose: The workspace should be designed to support both group and individual needs for interaction and for focus/privacy, providing access to appropriate work settings.

Shared use of common resources: Copy centers, galleys, and other common spaces should be shared resources for use by anyone. Meeting rooms should be reserved by the centralized conference room reservation system or by contacting the appropriate B/IO scheduler.

Flexibility and ease of repurposing space: The workspace should be flexible and adaptable over time, enabling the Agency to respond quickly to emerging world events as required.

Integrate technologies: The workspace should support increased acceptance and use of technology as integral to the work, with an emphasis on enabling mobility.

517.3.4 Workspace Allocation and Standards
Effective Date: 03/24/2016

USAID's space standards will utilize guidelines that fit within the principles outlined in 517.3.3.

SPACE STANDARDS

Space Type	Area (Sq. Ft.)	Comments
Workspace		
Enclosed Office A	180	Deputy Assistant Administrator/Independent Office Director
Enclosed Office B	110	Supervisory Staff
Enclosed Office C	225	Assistant Administrator

Workstation 1	56	Non-supervisory staff
Workstation 2	36	Institutional Support Contractors
Touchdowns	27.5	
Hoteling Seats	8	
Flex Meeting Seats	17.5	
Collaboration and Support*		
Conference Room – 18 Person	750	
Conference Room – 12 Person	500	
Conference Room – 8 Person	300	
Conference Room - 2-4 Person	200	
Meeting Room – 4 Person	96	
Open Collaboration Area – 4-6 Person	150	
Telephone/Focus Room – 1-2 Person	45	
Files, Storage and Equipment		
3-High lateral files	9	
2-High Book Shelf	9	
File Room	120	
Storage Room	150	
Equipment Storage	120	
Flat Files	15	

*Number of people based on seating around tables. Capacity of collaboration spaces vary.

Guidelines for specific space types are as follows:

(1) Individual Workspaces

a. Enclosed workspaces. There are two types of enclosed workspaces for individual work: (1) assigned private offices for supervisory personnel and senior managers; and (2) small shared/unassigned focus rooms for short-term focused individual work requiring concentration or privacy.

b. Open workspaces. All other individual workspaces will be open. The design features of open workspaces will vary depending on specific organizational/group needs and in response to the planning principles, e.g. size, enclosure, arrangement, features, etc.

c. Use approach. In an increasingly mobile work environment and in response to USAID mission-based flexibility needs, two approaches to the use of individual workspace will be utilized:

- Assigned workspace – Individual workspaces will be assigned on an as-needed basis based on work type and patterns. In some cases, assigned workspaces can be shared by two or more individuals who coordinate teleworking schedules.

- Unassigned workspace – Unassigned workspaces are intended for use by mobile USAID staff and visitors, as appropriate. Mobile staff could include staff who travel frequently, telework often, or are on short-term assignment/detail, which might include USAID staff located elsewhere.

(2) Group Workspaces

a. **Focus rooms** – Focus rooms are an important component of the USAID workplace because they provide a resource for small groups of people to meet. They can be used by two to three people for meetings/conference calls or by individuals who need the privacy for a short period. Focus rooms cannot be reserved.

b. **Other meeting rooms** – Other meeting rooms, from small to large, will be provided. To be most efficient and provide the greatest access to appropriate resources, there will be more small rooms than medium rooms. Large meeting rooms will be limited and available for use by all USAID B/IOs.

c. **Open meeting spaces** – All open workspace areas will include places for small meetings. Specific locations and numbers will be developed through the Workspace Change Process.

(3) Support Spaces

a. **Shared services**. Common shared services will be provided as an integral part of the workplace across all USAID workspace. Shared services include: printers, copiers, and fax machines.

b. **Others**. Individual B/IOs will have specific resource needs unique to their operations beyond the individual and group workspaces outlined above.

517.3.5 Designated Restricted and Unrestricted Space

Effective Date: 03/24/2016

Space will be designated as restricted and unrestricted in accordance with policies and procedures outlined in **ADS 565, Physical Security Programs (Domestic)**.

517.3.6 Workspace Changes

Effective Date: 03/24/2016

M/MS/HMD will continuously monitor the utilization of the USAID real property portfolio in Washington and work with B/IOs to plan for short- and long-term space requirements. The long-term space strategy is to consolidate Washington operations in two locations, the Ronald Reagan Building (RRB) and a building acquired by GSA. The RRB will be renovated to create a more functional and modern workplace. M/MS/HMD will work with B/IOs to design space in accordance with space standards and B/IO specific needs.

Workspace changes outside of this initiative will be considered and approved on a case-by-case basis.

B/IOs requesting a change in designated workspace or additional space to accommodate new requirements must submit a request to M/MS/HMD, using the **Request for Space Change Template**. M/MS/HMD space planners will conduct a detailed analysis of the requirements and present a recommendation to the Director of M/MS regarding actions required to meet the space needs. The analysis will be conducted in collaboration with M/CIO, SEC, and the Office of Human Capital and Talent Management (HCTM) (if personnel changes are involved). The review will include the following:

(1) Validation of requirement. M/MS/HMD will determine the consistency of the request with USAID/W long range space plans, the feasibility of accommodating the requirement in existing space, any impacts on other B/IOs, and the best approach for fulfilling request.

(2) Information technology. M/MS/HMD will coordinate with M/CIO on the information technology requirements, cost, and impact associated with the change request.

(3) Physical Security. M/MS/HMD will coordinate with SEC on physical security impacts and requirements.

(4) Personnel changes. M/MS/HMD will coordinate with HCTM where personnel and organizational changes impact the request.

(5) Budget and Schedule. Based on the determination of the best approach for fulfilling the request, M/MS/HMD will prepare estimates of costs and schedules. Exceptional requirements may trigger a request for additional space outside the current USAID/W portfolio and long range plan. Such requests will generally require coordination with GSA and may require Congressional notification.

517.3.7 Workspace for Non-Direct Hire Employees

Effective Date: 03/24/2016

Usually, workspace for institutional support contractors must be provided by the parent company as part of the terms of any Washington-based contract. Government space should only be considered when co-location with federal employees is necessary to carry out the scope of the contract or the contract employee(s) require routine access to information, systems, or tools that are only available in USAID space. Workspace may be provided for other categories of non-direct hire personnel (e.g., personal services contractors) to the extent that it can be accommodated within the initiating B/IO space allocation or can be made available as determined by the approving official in the Bureau for Management.

One or more of the following criteria must be met in order for the Contracting Officer/Agreement Officer (CO/AO) to include government-furnished space in a new or amended award for institutional support contractors to perform work in Washington:

a. The contractor provides daily administrative support to a principal or organizational unit (e.g., executive assistants, administrative assistants, program assistants).

b. The contractor requires routine access to USAID records that are not available electronically (e.g., personnel and financial records).

c. The contractor requires daily access to classified information, sensitive but unclassified information, or classified systems (e.g. Classnet).

d. USAID provides the principal tools and equipment needed to carry out the services.

e. Direct-hire staff must provide daily guidance in order to execute the deliverables/services defined in a mechanism/award.

The B/IO requesting USAID space for any category of non-direct hire staff must complete **AID 517-1 Form, Authorization to Provide Government-Furnished space for Non-Direct-Hire Personnel in Washington** and submit the request to M/MS/HMD for review. The form will be forwarded to the Director of M/MS for approval. A copy of the form must also be submitted to **workspaceapprovals@usaid.gov**. The form must be approved and provided to the CO/AO prior to the execution of a new or amended award which will result in an increase of workspace for non-direct hire personnel in Washington.

517.3.8 Space Cost Recovery

Effective Date: 03/24/2016

In accordance with **ADS 601, Funding Source Policy**, support costs must be charged to the same appropriation used to fund the salaries and benefits of employees. Accordingly, M/MS/HMD will recover the annual cost for direct-hires and contractors occupying USAID space where the salaries and benefits or contracts are not funded from the operating expense appropriation. Costs will be attributed based on the square footage occupied.

517.3.9 Joint Asset Management Plan

Effective Date: 03/24/2016

USAID and the Department of State have a **Joint Asset Management Plan** in place that is approved by the U.S. Office of Management and Budget (OMB) that prescribes the tools and programs in place for compliance with the requirements of **E.O. 13327**. The Asset Management Plan incorporates the 10 guiding principles as established in the "**Guidance for Improved Asset Management**" issued by the Federal Real Property Council.

USAID will report annually to the Federal Real Property Profile (FRPP) database, through the Department of State Real Property Inventory database system, the

Agency's inventory of real property holdings other than facilities acquired through GSA Occupancy Agreements.

517.3.10 Congressional Notification
Effective Date: 03/24/2016

The Bureau for Legislative and Public Affairs (LPA) must report to Congress at least 15 days prior to the obligation of operating expense or capital investment funds for the construction (including architect and engineering services), purchase, or long-term lease of offices, where the cost will exceed $1,000,000.

M/MS/HMD must work with LPA to prepare the report. USAID funds may not be obligated until after 15 days from the date of submission of the report or until after any Congressional issues are addressed, whichever comes later.

517.4 MANDATORY REFERENCES

517.4.1 External Mandatory References
Effective Date: 03/24/2016

a. **Competition in Contracting Act of 1984**

b. **E.O. 12072, Federal Space Management**

c. **E.O. 13327, Federal Real Property Asset Management**

d. **Federal Management Regulation, Subchapter C**

e. **Foreign Assistance Act of 1961 as Amended**

f. **General Services Administration (GSA) Customer Guide to Real Property Disposal**

g. **General Services Administration (GSA) Pricing Desk Guide, Edition No. 3, dated March 15, 2002**

h. **Guidance for Improved Asset Management**

i. **National Environmental Policy Act of 1969**

j. **Office of Management and Budget Management Procedures Memorandum No. 2013-02, Implementation of OMB Memorandum M-12-12 Section 3: Freeze the Footprint, dated March 14, 2013**

k. **OMB Circular A-11, Appendices A and B**

l. **OMB Memorandum M-12-12, Promoting Efficient Spending to Support Agency Operations, dated May 11, 2012**

m. **Presidential Memorandum, Disposing of Unneeded Federal Real Estate - Increasing Sales Proceeds, Cutting Operating Costs, and Improving Energy Efficiency, dated June 10, 2010**

n. **Title 41, Code of Federal Regulations (CFR) Parts 102-71**

517.4.2 Internal Mandatory References
Effective Date: 03/24/2016

a. **ADS 517maa, Joint Asset Management Plan**

b. **ADS 517mab, Request for Space Change Template**

c. **ADS 519, Building Support Services**

d. **ADS 565, Physical Security Programs (Domestic)**

e. **ADS 601, Funding Source Policy**

f. **USAID Real Property Efficiency Plan, Reduce the Footprint Implementation, October 26, 2015**

517.4.3 Mandatory Forms
Effective Date: 03/24/2016

a. **AID 517-1 Form, Authorization to Provide Government-Furnished space for Non-Direct-Hire Personnel in Washington**

517.5 ADDITIONAL HELP
Effective Date: 03/24/2016

a. **GSA Public Buildings Service**

This page provides information on GSA's Public Buildings Service whose mission is to provide superior workspace for the Federal employee. For more information contact the Office of the PBS Commissioner at (202) 501-1100.

b. **http://www.gsa.gov/iolp**

This is a database that allows visitors to the site the option of viewing expiring lease/occupancy information from over 8,900 buildings – owned and leased. Visitors to the site can also view expiring lease/occupancy information by GSA region, state, or congressional district. This is available under gsa.gov "Quick Links" under expiring leases. For more information call the Office of Real Property Asset Management at (202) 501-0638.

517.5.1 Optional Forms
Effective Date: 03/24/2016

a. SF-81, Request for Space

517.6 DEFINITIONS
Effective Date: 03/24/2016

See the **ADS Glossary** for all ADS terms and definitions.

circulation space
The space required for the efficient movement and flow of personnel through the assignable space. When planning for assignable Office space, a general space planning tool used to figure the circulation space is referred to as circulation factor with a factor of 25 to 33 percent of the total space is efficient. (**Chapter 517**)

hoteling/benching
A workspace which accommodates an alternative working arrangement. Employees can be provided with shared or temporary workspace. Hoteling/Benching may also refer to either single use or connected multi-unit workstations that can be assigned or scheduled for use on a given day or a particular period of time. (**Chapter 517**)

institutional support contractor
An individual who performs work for on or behalf of any Agency under a contractor and who, in order to perform work specified under the contract, may require access to space, information, information technology systems, staff or other assets of the Federal Government. Such contracts, include, but are not limited to services contracts, contracts between any non-Federal entity and any agency, and sub-contracts between any non-Federal entity and another non-Federal entity to perform work related to the primary contract with the agency. (**Chapter 517**)

lease
A written agreement between a lessee and GSA or USAID to occupy private building space under specific terms and conditions for a specified term and rent. (**Chapter 517**)

Occupancy Agreement (OA)
A written agreement that describes the financial terms and conditions under which GSA assigns, and a tenant occupies, GSA-controlled space. (**Chapter 517**)

operating Expense (OE)
Costs related to personnel, other administration costs, rental, and depreciation of fixed assets. (**Chapters 200**, **203**, **517**)

program of requirements
A summary statement of the Agency's space needs in a form that is mutually agreeable by both GSA and the Agency. These requirements must include information about the location, square footage, construction requirements, and duration of the Agency's space needs. (**Chapter 517**)

real property
A parcel or plot of land and any structures contained thereon, including, but not limited to, offices, garages, warehouses, residences, schools, and recreational facilities. (6 FAM 700) (**Chapters 517**, **518**, **535**, **629**)

rent
The cost assessed by GSA for space and related services to agencies with tenancy in GSA controlled space or as the agent in regard to commercially leased space. (**Chapter 517**)

rentable area
The total amount of space OU's can occupy or use within an entire building and the respective share of Building Common area in relationship to the Usable area. (**Chapter 517**)

restricted space
An area where storage, processing, discussions, and handling of classified documents is authorized. (**Chapters 517**, **565**, **567**)

space assignment
A transaction between GSA and the Agency that results in the right to occupy certain GSA-controlled space in return for payments to GSA for use of the space. Space assignment rights, obligations, and responsibilities are formalized in an Occupancy Agreement. (**Chapter 517**)

special use space
Any Space solely used for a unique task, such as, secure storage rooms, SCIF, central computer or network rooms, etc. These spaces can be occupied or unoccupied, but require special space consideration due to the unique function and equipment needed for the space. (**Chapter 517**)

unrestricted space
An area where storage, processing, discussion, and handling of classified documents is not authorized. (**Chapter 517** and **565**)

utilization rate
The percentage of capacity use for a given office or assignable area; measured in square feet per person. The measurement is derived from the overall square footage of the Office/Assignable area, divided by the total number of individuals or users within the Office/Assignable area. This derivation of usable space, provided to individuals within a given Office or Assignable area in order to perform their daily tasks includes the individual workstation, circulation space, and a portion of support spaces (conference rooms, copy rooms, etc.). (**Chapter 517**)

workstation
A modular work area constructed from freestanding desk units or panel hung systems furniture. (**Chapter 517**)

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