

INDIAN AFFAIRS DIRECTIVES TRANSMITTAL SHEET

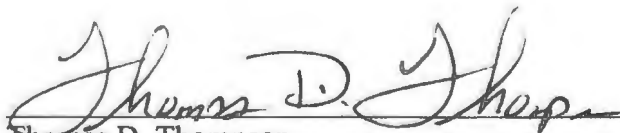
(modified DI -416)

DOCUMENT IDENTIFICATION NUMBER N/A	SUBJECT Space Management: Request for Space Handbook	RELEASE NUMBER 14-29
FOR FURTHER INFORMATION Office of Real Property Leasing (Central Office/ DAS-M)		DATE SEP 16 2014

EXPLANATION OF MATERIAL TRANSMITTED:

This handbook provides guidance for the acquisition of direct leased and General Services Administration (GSA)-provided space by programs and offices under the authority of the Assistant Secretary – Indian Affairs (AS-IA), including the Bureau of Indian Affairs (BIA), and the Bureau of Indian Education (BIE).

This handbook also addresses several Office of Inspector General audit findings and recommendations assigned to the program.



Thomas D. Thompson
Deputy Assistant Secretary – Indian Affairs (Management)

FILING INSTRUCTIONS:

Remove: None

Insert: 55 IAM – H (New)

SPACE MANAGEMENT

REQUEST FOR SPACE HANDBOOK



Office of the Assistant Secretary – Indian Affairs
Office of Real Property Leasing, Deputy Assistant Secretary – Indian Affairs
(Management)
1849 C Street, NW
Mail Stop: 3647 – MIB
Washington, DC 20240

INTRODUCTION

The Indian Affairs (IA) Request for Space Handbook provides guidance for the acquisition of direct leased and General Services Administration (GSA)-provided space by programs and offices under the authority of the Assistant Secretary – Indian Affairs (AS-IA), including the Bureau of Indian Affairs (BIA), and the Bureau of Indian Education (BIE).

This handbook is designed to provide guidance on Requests for Space as recommended by internal IA policies and procedures, Department of the Interior (DOI) and Office of Management and Budget (OMB) Memorandums, and applicable Executive Orders for both direct leased and GSA-provided space.

This handbook was last updated on August 20, 2014.

TABLE OF CONTENTS

	Page
Standardized Space Criteria Guidelines and Thresholds	2
Space Utilization Thresholds	5
Request for Space Procedure	7
General Guidelines for Office Spaces by Position/Level	10
What Happens after Request for Space is Received and Approved	11
Attachments	
Attachment 1 – <u>Freeze the Footprint Memorandum</u>	12
Attachment 2 – <u>Justification for New or Additional Space Memorandum</u>	22
Attachment 3 – <u>RFS Summary and Worksheets</u>	23
Attachment 4 – <u>GSA Needs Assessment Questionnaire</u>	32

Standardized Space Criteria Guidelines and Thresholds

General Description

Space requirements will vary from one program to another depending on mission objectives. However, there are some basic requirements that must be addressed when initially planning to obtain space. These include space planning and layout, general purpose and special purpose space floor plans, security requirements, telecommunication/information technology (IT) requirements, parking requirements and utilization of space. Space utilization considers private offices, systems furniture, circulation requirements, special purpose space, and warehouse use. Each of these items is critical in evaluating the determination of space needs, as each will have a direct impact on the cost and functionality of the space.

Space Planning and Layout

The program/tenant that will occupy the space will partner with Central Office Real Property Leasing and will be able to actively participate in the space layout planning process. The representative(s) who will participate in the space layout decisions need the ability to make space-related decisions on behalf of the program they represent. It is essential that the individual(s) know the specific space and program requirements for space layouts and/or common use space, such as space for files, printers, and other IT equipment, copy and fax equipment, etc. The program/office, GSA, or the lessor may provide professional space planning services.

Initial discussions should include the following:

- ❖ Co-location opportunities
- ❖ Type of furniture to be installed
- ❖ Building security and any special security needs
- ❖ Adjacencies of groups of people and/or spaces required to be located together
- ❖ Square footage requirements for various working groups, including a circulation factor for the overall space
- ❖ Size and type of storage, files, and other support areas needed for each particular group
- ❖ Small groups that can be flexibly located or used as “space fillers” if necessary
- ❖ Groups that do not require contiguous office space
- ❖ Funding and responsibility for:
 - Move costs and procurement
 - Communication moving and reinstallation

- Reimbursable cost items as identified in the Special Requirements
- Any change orders or requests made after the award of the lease
- Accessibility issues
- Fire and life safety issues
- ❖ If there is a union involved, management must include the union in various space decisions or as prescribed in the respective labor/management agreement
- ❖ Unusual or unique space need(s)

Note: For space planning purposes, the DOI benchmark is currently 180 usable square feet (USF) per person, including all individual and shared space such as workstations, circulation, storage, and conference rooms.

General Purpose Space

Open space planning concepts are to be utilized and the space design should consider reserving window and exterior space for the majority of the employees housed in open space. Special use and private offices are to be placed in the core area of the building. This configuration allows for the most optimal lighting and air flow arrangements which are part of the Energy Star and LEED Certification measures.

In general, there are two types of office plans: open and closed structured.

Ceiling High Partitioned Offices Versus Open Plan

The open plan approach, with very limited number of ceiling-high partitions for offices, is encouraged. It has a higher degree of efficiency and flexibility, and provides maximum distribution of natural light and day lighting techniques, as well as heating and cooling to the working areas. This approach can be adapted to a larger building depth and still present an open and airy atmosphere. It also encourages interaction between individuals and work groups.

To reduce space costs:

- ❖ Keep private offices to a minimum
- ❖ Use systems furniture which will also significantly improve space utilization
- ❖ Standardize systems furniture components to the maximum extent
- ❖ Dispose of excess and/or obsolete items
- ❖ Keep number of non-utilized furniture units to the minimum needed and store them in lower cost storage areas
- ❖ Conduct semi-annual office clean-up days

Release # 14-29, Issued: 9/16/14

New

- ❖ Regularly dispose of outdated materials or hard and duplicate copies available in electronic format
- ❖ Use filing space savers wherever needed for extensive, mandatory records storage needs
- ❖ Allocate only the furniture required for employees' duties
- ❖ Use furniture for its intended use. (For example: Are tables being used as bookcases? Are drafting tables being used as paper storage areas?)
- ❖ Within office organizations, share furniture (drafting tables, bookcases, file cabinets, etc.)
- ❖ Provide joint work areas in open spaces for employee work areas (team meeting areas, etc.)
- ❖ Provide shared work stations for individuals in part-time or field positions that spend 60% or over two days or more of their time outside the office
- ❖ For telecommuting positions, consider all types of space-saving furniture configurations and provide shared work stations whenever possible.
- ❖ Use "hotel" work spaces for visiting and temporary employees, along with students and interns

Security Requirements

Note: The following information includes general security requirement information only. Security assessments must either be conducted by the Department of Homeland Security (DHS) or the BIA Office of Justice Services (OJS) to determine security needs for facilities. The security assessment is confidential information and must be handled as such. Only authorized individuals should have access to, or knowledge of, the assessment.

Types of Security Concerns:

- ❖ **Setbacks** – the distance the building must be located from access roads, parking lots, and sidewalks
- ❖ **Security enhancements** – additional security provided by bollards, concrete barriers, bulletproof / glazed windows, building structure upgrades, etc.
- ❖ **Alarm systems** – alarm notifications to a security control center monitored by FPS or by a contracted private security company
- ❖ **Access control systems** – these provide controlled access into the facility by requiring key cards, codes, etc.

Effective October 1, 2004, DHS began billing through GSA for security fees on all GSA-provided space. There are two types of security charges:

- ❖ **Basic Security Rate** – the basic security rate is developed by DHS and approved by OMB on a per square foot basis. This charge is applied to all GSA-provided space. DHS must receive OMB approval to increase and / or change this rate.
- ❖ **Building Specific** – additional security charges for building-specific security requirements (guard services, access control systems, security alarm systems, etc.)

Parking Requirements

Handicap accessible parking spaces are provided as required by the using office or by local code, whichever is more stringent. Reserved, fee parking is provided for Government-owned vehicles (GOVs) only, as necessary.

Space Utilization Thresholds

IA and the DOI recognize the Building Owners and Management Association (BOMA) International standard (ANSI/BOMA Z65.1-1996) for measurement of space and definition for office area, or area where a tenant normally houses personnel and furniture. **The target goal for general purpose office space is a maximum overall utilization rate of 180 BOMA Usable Square Feet (USF) per person.** *Every effort should be made to achieve this goal and exception requests should include detailed justification for why an exception is necessary.*

Alternative Officing (AO), or alternative workplace arrangements, offer additional potential for reducing space requirements, improving utilization and saving costs. Telework, hoteling, desk sharing, satellite offices/telecenters, free address facilities, virtual offices, etc., are opportunities to achieve greater utilization efficiencies while meeting program mission objectives.

Note: space requirements should be based on the tasks required for a particular job and on the program's needs to accomplish its mission. Other factors affecting space needs may be privacy and acoustic requirements, access to daylight, collaborative needs, space availability, and budget.

Specific Utilization Issues:

- ❖ **Circulation and Common Areas** – a circulation factor of 25 percent is required for all office space and is included in the 180 BOMA Usable Square Feet requirement. This circulation factor is part of the utilization rate. The common area factor is not included in the circulation factor. Common area includes a share of the building support / common areas such as elevator lobbies, building corridors, and floor service areas.
- ❖ **Offices** – To provide optimum airflow and to keep alterations and operating costs contained, systems furniture should be used to the greatest extent possible. The use of private offices should be limited. When designing space, small conference rooms or “interview” rooms may be a more cost-effective way of meeting the need for “closed-door” meetings than excessive numbers of private offices and/or conference areas within private offices.

- ❖ **Warehouses** – Warehouses are typically large storage facilities. There may be incidental offices or other types of space within the building but the primary use is to store supplies of oversized equipment, excess furniture/equipment, etc. Every effort should be made to keep the size of the warehouses to a minimum by excessing unneeded furniture and equipment. Warehouse utilization rates pertain to the percentage of the warehouse being used for storage as compared to square feet per person.
- ❖ **Special Purpose Space** – All of these office space categories are a part of the overall utilization rate and should be kept to a minimum.

The following space requirements are a general guideline for various space types. Each program/office may have more specific requirements that are not meant to be captured in this handbook. Further, these types of space are only provided when there is a need that can be justified by sound business rationale.

- **Conference Rooms** – the size of conference rooms should be determined by multiplying the typical number of individuals that will use the room times 10 square feet per person. Smaller conference rooms, also called interview or meeting rooms, may be used to meet conference/meeting needs.
- **Employee Break Room** – when employee break rooms are used by multiple programs/offices, they should be included as joint use space and only counted towards overall utilization rates when used exclusively by one organization.
- **Mail Room / Copy Room / Supply Room** – combine use of these types of rooms whenever possible. Size of rooms should be at a minimum required.
- **Computer Rooms / Telephone Rooms** – combine use of these types of rooms whenever possible and keep size to a minimum required.
- **Secured File Room** – size should be kept at a minimum required.

Space Utilization Exclusions:

The following types of space are normally excluded from the space utilization calculation:

- ❖ Libraries
- ❖ Evidence Rooms
- ❖ Shared Server Rooms
- ❖ Lab Space
- ❖ Warehouse
- ❖ Wareyard

Request for Space Procedure

Real Property Lease Acquisition Process

IA Central Office space management Real Property Leasing contacts are included below.

NAME	EMAIL	PHONE NUMBER
Matthew Cravatt, Building Management Officer and Space Management Officer	Matthew.Cravatt@bia.gov	(202) 208-3644
Edward Spivey, Lease Contracting Officer – Direct Leases	Edward.Spivey@bia.gov	(703) 390-6550
Kim Covington Lease Contracting Officer – Direct Leases and GSA-Provided Space Point of Contact	Kim.Covington@bia.gov	(202) 208-6188

The general steps for a space request are as follows:

- I. **Identify and Justify the Space Need** – when a program/office determines a need for new or expanded space, a Request for Space (RFS) package must be completed for review. **This same package must be filled out 18 to 24 months in advance of a lease or occupancy agreement expiration as well in order to reevaluate and support current space needs.*
 - a. There must be a mission-related, justifiable need for any new or expansion space, keeping in mind that all DOI bureaus are under the Rhea Suh [Freeze the Footprint Memorandum](#) (Attachment 1) which effectively “freezes” the IA real property inventory at FY 2012 benchmark levels.
 - b. Any increase in space must be “offset” by a corresponding decrease.
 - c. Reporting on current actions, future plans, and historical results will be monitored by the Department annually and compared against the FY 2012 benchmark levels. All actions will need to include details within the reporting. While this does not necessarily preclude new or expansion space from being approved, it does mean that additional backup and justification is necessary.
 - d. A [Justification for New or Additional Space](#) form (Attachment 2) must be filled out which outlines the need for the new or expansion space and why it is mission-critical.

II. **The program will complete a RFS package which includes the following documents, in addition to the Justification for New or Additional Space document included on the previous page:**

- a. **[Request for Space Summary and Worksheet \(Attachment 3\)](http://iiaabqzucmw01p.ia.doi.net:16200/inside.indianaffairs/Employee/HRForms/index.htm)** – this Excel spreadsheet serves as the basis for the space request calculations and outlines primary office space, warehouse, wareyard, office support areas, and special requirements. This spreadsheet is located on the IA Online Forms intranet site:
<http://iiaabqzucmw01p.ia.doi.net:16200/inside.indianaffairs/Employee/HRForms/index.htm>
 - i. Basic **work step instructions** are included on the first tab.
 - ii. The **summary sheet** identifies the totals for each type of space outlined above, and will also define the geographic service area and the delineated area for where the space is to be located within the marketplace. In smaller, more rural areas, the service area and the delineated area may both be the reservation served, or the city limits; whereas, a larger metropolitan area's service area and delineated area may be the entire central business district (CBD) or a quadrant thereof.
 - iii. The **employee count worksheets** include a breakdown of staffing, including names, titles, grade levels, and supervisory functions, if applicable. All employees (full-time, part-time, contractors, seasonal, etc.) should be listed on these worksheets along with any vacant and funded positions.
 - iv. The **office support spaces worksheet** should identify administrative areas such as a reception area, mail room, break room, conference room, etc., and provide the purpose and specific requirements, the type of space or adjacency required (a mail room needing to be located near the reception area, for example) and square feet required.
 - v. The **special requirements space worksheet** needs to outline special use areas such as server rooms and vaults. The unique requirements needed should be outlined and detailed (a vault with 6-inch thick concrete walls floor to ceiling, with 24/7 humidity and temperature control, secured access, and a dry fire suppression system, for example).
 - vi. The **warehouse/wareyard worksheet** should provide detail about any needed warehouse or wareyard space, including what program will utilize the space, what the purpose of the space is needed for, and the square footage requirement. *Any potentially hazardous items to be stored should be noted (for example, paint).

Requests for new or expansion space **should not** be forwarded for processing unless funds are available. *It is each office's responsibility to ensure its budget request includes any request for funds to cover new or expansion space costs, including relocation / moving of offices.*

Funding availability will be needed for at least the first two full fiscal years and until such time as central office Real Property Leasing can include the cost(s) within the Exhibit 54 Budget to the Department.

- b. **GSA Needs Assessment Questionnaire (Attachment 4)** – this Word document provides additional information about the space needs in terms of customer information and contacts, GSA services offered, building features and building support spaces, in addition to parking, security, and normal business hours of operations. This Questionnaire is located on the IA Online Forms intranet site:
<http://iiamabqzucmw01p.ia.doi.net:16200/inside.indianaffairs/Employee/HRForms/index.htm>

This document should be filled out with as much detail as possible as it will help assess items such as overtime utilities needed, tenant improvements required, etc.

III. Signatures Needed – Once the RFS package has been completed by the program manager/superintendent/line officer, it will then need to be routed to the appropriate funds certifying and signatory individual(s) for review. Senior Managers at the ASIA, BIA, and BIE program office level, such as the Director, Deputy Bureau Director, Regional Director, or Associate Director(s) level are required to certify funding availability and approval of the space request.

IV. The regional office should then forward the RFS package to the Space Management Officer (SMO)'s office for processing. RFS packages submitted will be prepared for approval/denial by the Deputy Assistant Secretary – Indian Affairs (Management) (DAS-M) with recommendation(s) within 30 work days of receiving the initial completed.

V. Determination by DAS-M – the DAS-M will issue a decision within two (2) weeks for subsequent action. Approvals will be processed by Real Property Leasing which will coordinate, manage and report on major activities associated with all direct leased and GSA-provided spaces in the portfolio.

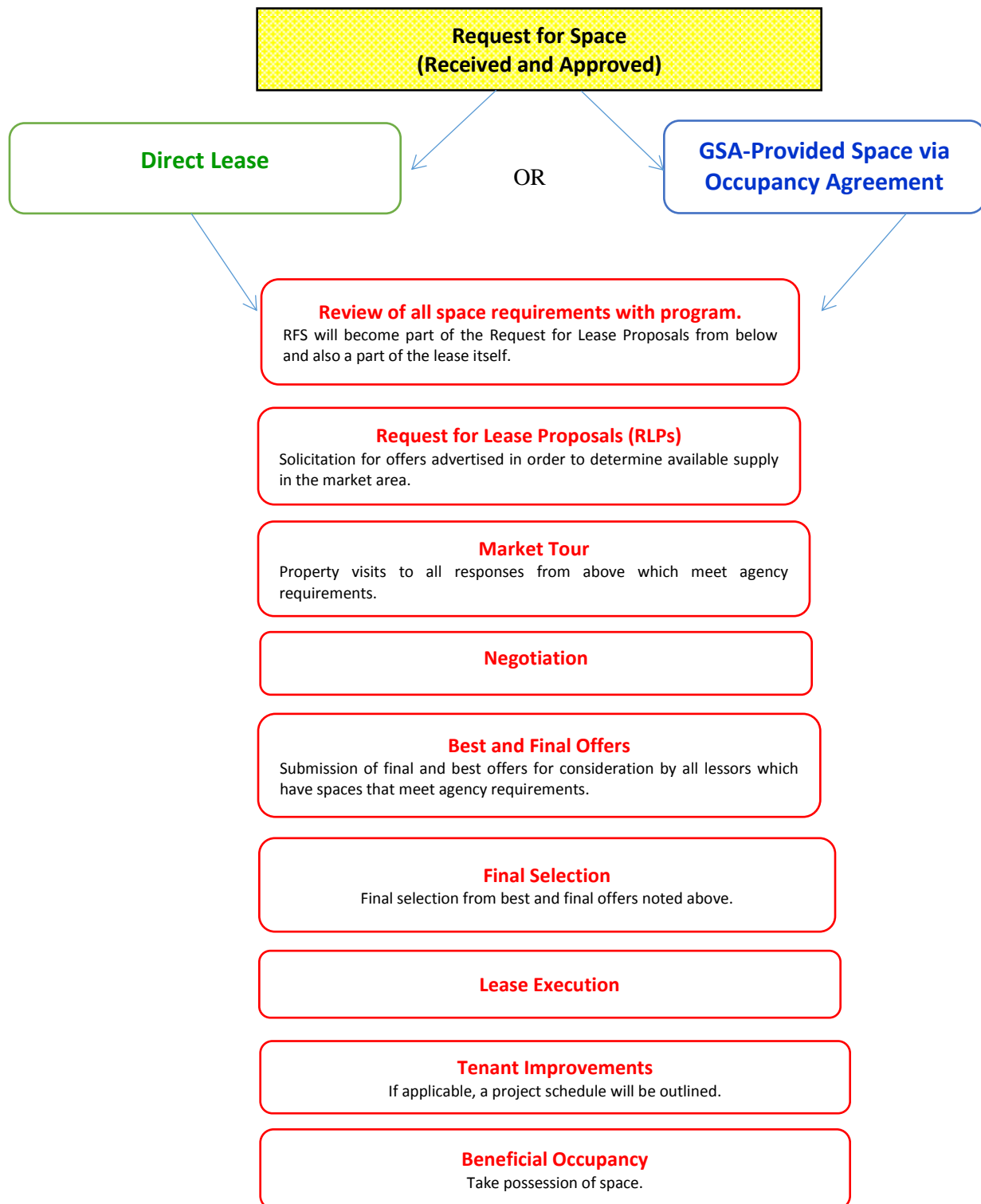
At no time is any office other than Central Office Real Property Leasing to contact or deal directly with GSA and/or a landlord. Only a designated warranted lease contracting officer (LCO) can represent the United States in any GSA or direct lease negotiations or effect any lease or any modification to a lease if delegated such authority by GSA.

General Guidelines for Office Space by Position/Level

General guidelines for office spaces by position/level are illustrated below. These guidelines assist with ensuring that the 180 SF per person utilization rate is achieved and are consistent with Departmental objectives.

Position / Level	Style	Square Footage
SES and GS-15	Private Office	180 to 240 SF
GS-14 (supervisory)	Private Office	150 SF
GS-13 to GS-14 (non-supervisory)	Workstation	120 SF
GS-11 to GS-12	Workstation	96 SF
GS-09 to GS-10	Workstation	84 SF
Up to GS-08	Workstation	64 SF
Contractor	Workstation	64 SF
Receptionist with office support equipment	Workstation	84 to 96 SF
Conference Room / Meeting Room	Private Space	10 SF x average number of occupants to utilize space

What Happens after the RFS Package has been Received and Approved



Attachment 1 – Freeze the Footprint Memorandum



United States Department of the Interior

OFFICE OF THE SECRETARY
Washington, D.C. 20240

FEB - 5 2013

Memorandum

To: Assistant Secretaries
Heads of Bureaus and Offices

From: Rhea S. Suh *Rhea S. Suh*
Assistant Secretary – Policy, Management and Budget

Subject: Freeze the Footprint Program

Summary:

Section 3 of Office of Management and Budget (OMB) Memorandum 12-12, “Promoting Efficient Spending to Support Agency Operations,” established the “Freeze the Footprint” policy, and stated that OMB would provide “additional guidance for carrying out” that policy. OMB has not issued final policy but shared a draft version that we have circulated along with draft Department of the Interior policy. This memorandum issues final policy for Freeze the Footprint for the Department to allow bureaus and offices to begin implementation immediately. If OMB issues guidance that modifies any of our assumptions, we will notify you immediately.

The “Freeze the Footprint” policy is intended to control utilization and spending associated with real property. Each bureau/office must maintain its total square footage of office and warehouse space consistent with the FY 2012 levels. In addition, each bureau/office is required to submit a three-year Real Property Strategic Plan that focuses on multiple aspects of Federal real property management. The Department of the Interior Strategic Plan will be a compilation of bureau/office plans, which will support attainment of OMB’s goals for:

- Square footage – each agency is to maintain 2012 levels of office and warehouse space, from FY 2013 through 2015
- Leasing costs – each agency is to provide a quantitative analysis of leasing costs and how they will control leasing and other costs
- Efficiency in utilization of space – each agency must identify actions to maximize and increase efficiency in utilization of space
- Processes and internal controls that ensure effective management of space and budget – each agency shall identify strategies, policies, methods and procedures to comply with policy.

Interior’s Freeze the Footprint:

In August of 2011 the Assistant Secretary- Policy, Management, and Budget established related cost saving policies through a memorandum to all bureaus/offices. These policies, controls, and

Page | 1

metrics will remain in effect and be supplemented with new requirements as the Department implements the Freeze the Footprint policy. Included in this policy was a space utilization cap of 180 square feet per person.

Inter-bureau transfers of real property shall be scrutinized and approved through an appropriate review process at the bureau level, if such an internal control process exists, or at the Departmental level, if it does not. See Appendix 1 for policy on inter-bureau transfer.

Bureaus/Offices should leverage their five-year Space Management Plan and their five-year Deferred Maintenance and Capital Improvement plan to prepare their three-year Real Property Strategic Plan and ensure that the processes to enforce the goals in the Strategic Plan align with leased space and owned space controls. This new strategic plan will demand close coordination and integration between the owned and the leased space management teams.

DOI will monitor compliance with this policy on a semi-annual basis to determine whether a bureau/office has increased its real property footprint compared to its FY 2012 baseline. While compliance with the “Freeze the Footprint” policy will be evaluated based on total square footage each year, the Real Property Strategic Plans for each bureau/office should contain a summary of current leasing costs and owned facility operations and maintenance (O&M) costs with a quantitative analysis and how these will be managed over the next three years. The Plans provide an opportunity to describe each entity’s overall approach in managing real property consumption and spending. There may be circumstances where a bureau/office has exceeded its FY 2012 square footage baseline in a given year, but is still deemed compliant with the “Freeze the Footprint” policy based on offsets. The Department will also consider an exemption if the deviation is associated with, a net reduction of total leasing costs relative to the FY 2012 spending baseline.

Actions Required:

1. **Real Property Strategic Plans.** Within ninety (90) days of this Memorandum’s issuance, each bureau/office shall develop and submit a Real Property Strategic Plan. Every year, bureaus/offices will be asked to submit adjustments to the Plan, as needed. The purpose of the plan will be for the bureau/office to provide information about the process to manage to the current baseline of FY 2012 office and warehouse space, management of costs and budget, current and planned acquisitions and offsets and strategies, policies, and methods to remain compliant with the “Freeze the Footprint” policy,. The bureau/office Senior Asset Mgmt Team Executive and Chief Financial Officer (CFO) shall certify the plan.

The Real Property Strategic Plans shall include the following components:

- a. *Compliance with bureau/office Baseline:* Each bureau/office shall identify the office and warehouse baseline, in terms of square footage, leasing costs and O&M costs for owned space. The bureau/office shall provide the 2012 actual costs for owned and leased office and warehouse space and report on planned changes that may affect the bureau/office overall domestic office and warehouse footprint over the course of a

three-year period (i.e., from FY 2013 through FY 2015). This analysis should include a descriptive narrative for how the bureau/office will remain compliant with the “Freeze the Footprint” policy, the cost (\$/SF) of owning and operating office and warehouse space versus leasing, and plans to shift resources from leased space to owned space, and plans to address additional O&M funding needs for owned space. This analysis should also identify any new leases, acquisitions, or expansions and associated offsets. This plan is an opportunity for each bureau and office to better inform the Department of its strategy, its challenges and its requirements for consolidation, collocation and other potential actions to achieve more effective and efficient use of owned and leased space.

- b. *Costs*: While bureaus/offices will not be held to the same compliance standards as the square footage baseline, they shall provide a quantitative analysis and discussion of their current total leasing costs and O&M costs and how they will control leasing and other costs over the three year period. The Bureau/Office should provide an analysis of how to shift funding allocation from leased assets to owned, to supplement the underfunded O&M account.
- c. *Efficiency*: Bureaus/offices shall provide an analysis and discussion of actions they are taking to maximize and increase efficiency in their utilization of space. This should include, specifically, plans for disposal and surplus of space. GSA is interested in exploring a new concept to exchange buildings for services (such as leases and building management), we would like to explore this option with bureaus/offices that have proposals. Bureaus and offices are encouraged to work with PMB to pursue proposals to move from leased space into Federal space, wherever possible. PMB will continue to support bureaus and offices that want to collocate under the auspices of Service First.
- d. *Internal Controls*. Each bureau/office shall identify the strategies, policies, methods, and procedures complying with the “Freeze the Footprint” policy. Please identify by name and title the executives that are accountable for decisions and oversight. Controls must include, but are not limited to:
 - i. the processes through which the bureau/office will identify, execute and secure approval for new acquisitions, expansions and growth and offsets when acquiring additional office and warehouse space;
 - ii. internal reviews and certification processes, where all new leases, acquisitions, expansions, or other growth in the bureau/office office and warehouse space, at all locations, require approval by the bureau/office CFO or Senior Asset Mgmt Team Executive, before they can be implemented;
 - iii. processes for bureaus and offices to coordinate new office and warehouse acquisitions with the DOI CFO (or identified delegate) and SRPO for owned assets greater than or equal to 100,000 square feet and GSA occupancy agreements or direct leases equal to or greater than 50,000 square feet; and

- iv. tracking of all domestic bureau/office office and warehouse increases and offsets, netting to zero annually .
 - e. *Exceptions:* On a narrow and case-by-case basis, growth in bureau/office and warehouse space may result in a bureau/office exceeding its FY 2012 baseline in a given year. Bureaus/offices must explicitly address these situations in their Real Property Strategic Plans and demonstrate how they are mitigating the impact through efforts to reduce space and enhance utilization of space. DOI will consider these exception requests in the context of a bureau's overall strategy to constrain its footprint and reduce spending on real property.
- 2. **Annual Update to Strategic Plans.** On annual basis, consistent with the FRPP reporting cycle, bureaus/offices shall develop and submit an updated Real Property Strategic Plan that contains the following information:
 - a. *Analysis of Performance.* Bureaus/Offices shall include an updated report of square footage and costs and a discussion of their performance benchmarked against the information contained within its Real Property Strategic Plan. PMB will conduct a semi-annual review of bureau/office compliance based on interim data submitted by bureaus that will factor into this discussion and presentation.
 - b. *Adjustments to Real Property Strategic Plans.* Bureaus/Offices shall include any necessary adjustments to its Real Property Strategic Plans including a detailed narrative and analysis for why these adjustments are necessary.
- 3. **Freeze the Footprint.** On an annual basis, a bureau/office shall not increase the size of its domestic real estate footprint, measured in square footage, for space predominately used for offices and warehouses. DOI, through its role in department-wide coordination of real property policy, will monitor this performance semi-annually. As OMB has retained the ability to modify and establish more aggressive targets, DOI retains the ability to modify bureau/office square footage and cost targets, to add additional property types or cost categories in the future.
 - a. *Baseline for Measurement.* A bureau's/office's total square footage for office and warehouse space shall remain at the FY 2012 level. The baselines will be calculated based on the FY 2012 Federal Real Property Profile (FRPP), FY 2012 General Services Administration's (GSA) Occupancy Agreements, and FY 2012 bureau Leasing Agreements. Within 30 days of the issuance of the final OMB Memorandum, GSA will consolidate this information and submit to DOI for review. Within (14) days of receipt, DOI in collaboration with the bureaus, may provide comments for GSA consideration. Final baselines shall be established and submitted to OMB (thru GSA) no later than February 28, 2013.
 - b. *Annual Evaluation of Compliance.* DOI will evaluate bureau/office compliance on a semi-annual basis (in June and December). As established in Section 4(b) of this

Memorandum, GSA will collect and synthesize annual DOI information for monitoring and enforcement purposes, as part of the FRPP reporting cycle. DOI's semi-annual evaluation will compare bureau/office baseline information against current-year information prepared by GSA (containing information from the FRPP, Occupancy Agreements, and Bureau leases) and bureau/office Real Property Strategic Plans as outlined in Section 2 of this Memorandum. There may be circumstances where a bureau/office has exceeded its FY 2012 square footage baseline in any given year, but is still deemed compliant with the "Freeze the Footprint" policy based on offsets identified, or a net reduction of total leasing costs relative to its FY 2012 spending baseline.

- c. *Requirements for Offsets against Real Property Acquisitions.* Bureaus/Offices shall achieve offsets through consolidation, co-location, or disposal of office and warehouse space, including declarations of excess to GSA.
 - i. In general. On an annual basis, a bureau/office must offset growth in combined office and warehouse space only with other corresponding combined office and/or warehouse space (*e.g.*, a bureau may not offset growth in office space with offsets in warehouse space) to ensure no increase in the size of these real property assets, compared against the baseline.
 1. A bureau shall not use properties that the bureau has "mothballed" (*i.e.*, put into a closed state where the property is vacant and incurring little to no costs) as an identified or realized offset.
 2. A bureau shall not use enhanced use leases (EULs) and outleases—properties that are being occupied by a non-government entity that remain titled to the Federal government—to offset the agency's growth in its real estate inventory. However, the declaration of a property as "excess" to GSA will count as a disposal, because this action will result in the inevitable transfer of the property from the bureau's inventory.
 - ii. For certain owned and leased properties. For owned or otherwise managed assets, equal to or greater than 100,000 gross square feet, and for directly leased or GSA-provided space, equal to or greater than 50,000 rentable square feet, additional requirements apply prior to acquisition.
 1. For these properties, bureaus/offices must certify to DOI, on a transactional basis, that it has identified a corresponding offset that will keep the bureau compliant with the "Freeze the Footprint" policy. The Department's SRPO will review these changes before they can be implemented. DOI, in coordination with GSA, will ensure proper accounting for these acquisitions and offsets and notify GSA when there is evidence that DOI may have exceeded its established baselines for total square footage. Bureaus/offices

will also include current and anticipated offsets for these properties in their Real Property Strategic Plans.

2. Exception: Office space and warehouse inventory (of any area) acquired to support specific emergency situations affecting life, health, and safety. However, the bureau/office shall notify DOI at a time that does not impede the bureau's ability to adequately respond to the emergency of any increase in office or warehouse space and plans to divest of the property when emergency situation has ended. The Department's SPRO will review these exceptions.
4. **Requirements for FRPP Reporting.** Bureaus/Offices shall take appropriate actions to ensure that data reported to the FRPP is accurate, complete, and consistent. In addition, beginning in FY 2013, GSA shall include the following information in the FRPP Data Dictionary, and beginning in FY 2013 and, on an annual basis thereafter, bureaus/offices shall report on these data elements:
- a. The number of government employees and contractors occupying office and warehouse space.
 - b. In FY13, a lump sum of annual operating & maintenance costs for offices and warehouses. In FY14 and FY15, a breakdown of annual O&M to include, but not limited to:
 - i. Leasing costs;
 - ii. Utilities;
 - iii. Taxes;
 - iv. Service contracts; to specifically cover Cleaning and Roads & Grounds
 - v. Repairs and maintenance
 - vi. Security
 - c. Any other FRPP definition which is necessary to remain consistent with this guidance.
5. **External Monitoring and Reporting.** GSA and OMB will implement the following controls to improve the consistency and accuracy of information used to measure agency performance:
- a. *Update to OMB Circular and Audit Bulletin.* OMB will update OMB Circular No. A-136, *Financial Reporting Requirements*, to include reporting requirements on "Freeze the Footprint" activities. In addition, OMB will update OMB Bulletin No. 07-

- 04, *Audit Requirements for Federal Financial Statements*, to include a requirement to review agency internal controls for the “Freeze the Footprint” policy.
- b. *GSA Monitoring*. On an annual basis, GSA will analyze DOI data submitted to the FRPP and DOI Occupancy Agreements submitted to GSA, consistent with the FRPP reporting cycle, to measure compliance with the policy. In addition, GSA will perform data integrity tests on DOI-submitted FRPP and occupancy agreement data that will help ensure the information is valid and reliable.
 - c. *OMB Reporting*. As established in Section 1(b) and 4(b) of this Memorandum, on an annual basis, consistent with the FRPP reporting cycle, GSA will transmit a report to OMB that lists DOI’s current-year square footage compared to its FY 2012 baseline. GSA will submit its report to OMB within 60 days of final FRPP submission.
6. **Enforcement**. In the event that a bureau/office exceeds its square footage baseline, or specified reduction target established by DOI, which is not outlined in the bureau’s Real Property Strategic Plan, DOI may impose corrective actions. These corrective actions will be proportional to the degree to which the bureau/office is out of compliance with the “Freeze the Footprint” policy.
 7. **Transparency**. GSA, in consultation with OMB, will update *Performance.gov* on an annual basis with summary-level data, to show DOI compliance with the “Freeze the Footprint” policy. Before updating the website, GSA will perform a final review to verify and certify that the data to be posted is complete and accurate.
 8. **Consultation with GSA**. Throughout this process, DOI will consult GSA on how to utilize technology and space management to consolidate building space, increase occupancy rates in facilities, and eliminate lease arrangements that are not cost or space effective.
 9. The Office of Acquisition and Property Management (PAM) shall be responsible for coordinating this action for the Department and establishing further guidance when needed.

Glossary of Terms

Co-location. For the purposes of this Memorandum, a co-location is the consolidation of two or more functions from two or more agencies, where one agency consolidates its function into the host agency's space.

Note: As a best practice, agencies should first consider and pursue available co-location opportunities within the Federal real estate inventory, especially those that will result in no net growth of the overall Federal real estate inventory. The offset created by a co-location is the reduction in the occupied space of the host agency for the host agency's function, and the reduction created by the disposal of the unnecessary property from the agency that is co-locating into the host's space.

Consolidation. For the purposes of this Memorandum, a consolidation is combining one or more components, offices, bureaus or divisions, of the same agency in an existing owned office or warehouse space, and disposing of the square footage in a leased facility.

Disposal. For the purposes of this Memorandum, a disposal is a sale, demolition, lease termination, public benefit conveyance, Federal transfer, or any other action that results in the removal of the asset from the inventory of the agency. For GSA space leased on behalf of another agency, disposal is recognized as occurring on the agency rent termination date.

A disposal creates an offset in the amount of the square footage of the office or warehouse space disposed. Within an agency's own inventory of owned and leased office or warehouse space, a consolidation can yield subsequent disposals that create offsets.

Office Space (From FRPP Data Dictionary). Buildings primarily used for office space or military headquarters

Otherwise Managed Assets. Assets identified in the FRPP Guidance dated August 16, 2012. Assets include state government owned, foreign government owned, museum trusts, and withdrawn land.

Predominant Use (From FRPP Data Dictionary). The greatest use of the real property asset as noted in the FRPP. For example, buildings used primarily for office purposes are classified as "office" even though certain portions of them may be used for storage or research.

Warehouse Space (From FRPP Data Dictionary). Buildings used for storage, such as ammunition storage, covered sheds, and buildings primarily used for storage of vehicles or materials. Also included are underground or earth covered ammunition storage bunkers and magazines. This category excludes water reservoirs and POL (petroleum, oil, and lubricants) storage tanks which are storage structures. Space utilized for museum collection management, curation, education, research and storage is NOT considered warehouse space.

Appendix 1

Interim Guidance for Screening Excess Real Property

The Department of the Interior continues to make progress in reducing the footprint of our real property portfolio. Several bureaus have initiated disposal actions on administrative real property holdings to improve utilization, consolidate activities, and generate savings and efficiencies in use of operations and maintenance (O&M) funds. In recent months GSA modified the requirements associated with reporting excess real property for disposition. These requirements, which are established in the Federal Management Regulation (FMR) 102-75, "Real Property Disposal", include completing Standard Form (SF) 118, "Report of Excess Real Property" and the accompanying forms and checklists.

One significant change to these forms requires the disposing bureau/office (bureau) to certify that the excess property has been screened against the known needs of the reporting agency. The Department does not currently have a repository of known needs to assist with certification. Until such a repository exists, or a Department-wide electronic listing of excess real property is available for bureau review, the Office of Acquisition and Property Management (PAM) is requesting that bureaus follow the interim process outlined below when real property containing constructed facilities is deemed excess to mission needs.

1. The disposing bureau will submit the completed SF-118 and all related documentation required by FMR 102-75 to PAM when they seek to dispose of a land parcel with constructed facilities.
2. The PAM staff will distribute the package to the Asset Management Team (AMT) for distribution to potentially interested parties within each bureau. The timeframe for the initial review should be no more than two weeks. Additional time and details may be necessary if the initial review identifies a potentially interested party within the Department.
3. The AMT members will report back to PAM if there is interest in transferring the real property across bureaus. If there is no interest or if no response is received, PAM will inform the disposing bureau that it may proceed with reporting the real property as excess through GSA.
4. If any bureau expresses interest in acquiring the real property in question, the interested bureau shall submit through the bureau's AMT member to the AMT Chairperson (Chair) with copies to PAM, a written business case that details the compelling need that would be satisfied through the internal transfer of real property. The business case shall include:
 - (a) A completed GSA-1334, "Request for Transfer of Excess Real and Related Personal Property";
 - (b) A set of photographs and maps that illustrate the subject properties and locations;
 - (c) A narrative explaining the purpose for which the properties are to be used and how this mission need has been satisfied in absence of the property;
 - (d) The impact of the acquisition on O&M budgets and a budgetary estimate of the anticipated annual O&M expenditures;
 - (e) The impacts to the bureau if the transfer is denied;
 - (f) A list of real property to be disposed if the property is transferred;
 - (g) A condition assessment report on the subject property with enough detail to identify major deficiencies, cost to repair, and Facility Condition Index;
 - (h) Any available reports on environmental assessments, historic evaluations, etc;
5. The AMT Chair and PAM will review the package within two weeks of receipt. If the AMT Chair concurs with the business case and request for transfer, both bureaus/offices will be notified. The requesting bureau will develop and submit to the disposing bureau for review and

concurrance a Memorandum of Understanding (MOU) outlining the roles and responsibilities of each party and the completed GSA-1334. Following execution of the MOU, the disposing bureau shall inform GSA of the action and any additional administrative/legal processes necessary to transfer title, property records, etc. If the AMT Chair does not concur with the business case, both bureaus/offices will be notified and the disposing bureau shall proceed with the disposal action through GSA.

The interim procedures outlined above provide the Department with direction and a process for evaluating potentially excess real property until permanent policy and support systems are developed. The procedures also provide general oversight of proposed internal transfer activities that may impact real property asset management goals. The Department is sensitive to these internal real property transfers because such actions equate to new acquisitions by the receiving bureau.

The Department's intent is to ensure that these acquisitions are appropriately managed, similar to other capital investment strategies such as design/construct or leasing. Bureaus should develop an appropriate capital planning process for evaluating and approving the business case of these investments with rational thresholds for approval similar to other strategies of acquisition. Until such processes exist and are communicated to the Department, all internal transfers will follow the procedures outlined above.

Further information and guidance on the overall Federal real property disposition process is available through GSA at the following website <https://resourcecenter.secure.force.com/pbs/PropertyDisposal>.

Attachment 2 – Justification for New or Additional Space Memorandum

Superintendent / Program

Justification for New / Additional Space Memorandum

To: Regional Director / Senior Management,

From: Superintendent / Program Manager, xxx Agency / Programs

Subject: New / Additional Space Request

I am submitting a request for New / Additional space for the xxx Agency / Program. This request is an unbudgeted requirement and I / we understand that the cost will be borne by the Agency / Program until such time that it can be covered by the Bureau's Rental Account.

Justification for the New/Additional space includes _____

This New / Additional space request needs approval from the Regional Director / Senior Management). I am requesting your approval.

Superintendent / Program Manager

“I Approve / Disapprove the xxx Agency / Program New / Additional space request dated xx/xx/xxxx.”

Name of RD or Senior Management

Date

Attachments:

Attachment 3 – RFS Summary and Worksheets

4/20/2014 rev. klc

Work Step Instructions for Request for Space (RFS) Summary and Worksheets

1. Complete the **Summary** Worksheet's type of request, geographic service area and delineated area. Note any office support areas, warehouse space, wareyard space, and special requirements as they pertain to needs and mission. Include parking information for government vehicles, visitor parking (on average), and number of employee parking spaces. Specific details and requirements can be provided on the subsequent pages (see #3 below).
2. Complete the **Employee Count** Worksheets (if you do not need as many pages, you can "hide" the tabs by right-clicking on the tab - *but please do not delete tabs*). Make a note of any supervisory positions. **In order to meet reduced space utilization rates as outlined by current Executive Orders and Mandates, only select positions are eligible for single, private offices. If you believe there is a justification for a private office for a non-supervisory position, please provide written detail which will be reviewed on a case-by-case basis.*
3. Complete the **Office Support Area** and **Special Requirements** Worksheets. **Note specific requirements with as much detail as you can provide, as this will help with making sure a potential space can fully meet your needs. *Some examples are noted on the worksheet pages and include, for example: vaults - 10' x 12' with humidity level below 50% and 24/7 temperature control of 65 degrees or less, 6-inch thick concrete walls floor-to-ceiling, with secured entrance and doors with fire rating of two hours minimum.*
4. Complete the **Warehouse / Wareyard** Worksheet (tab all the way to the right), if applicable.
5. Forward to Senior Manager (per IAM Chapter 1, Part 21, Section 1.5, Item E. Senior Manager - IA, BIA, and BIE program offices at the Director, Deputy Bureau Director, Regional Director, or Associate Director level(s) of management) to certify funding availability and approval of space request.
6. The Senior Manager will then forward to the Space Management Officer (SMO)'s office for processing.

Special Notes:

*Please do not overwrite protected cells that are automatically calculating or automatically filtering. These are colored blue.

**Send as an Excel spreadsheet and not a PDF file so that changes can be made if necessary.

***Please contact Kim Covington if assistance is needed with these forms at Kim.Covington@bia.gov; (202) 208-6188 office; (770) 595-6629 cell

**Indian Affairs
RFS Handbook**

Date 4/20/2014	Local Agency Contact (name)	Phone No.	Agency Market Survey Representative: Kim.Covington@bia.gov	Phone No. 202.208.6188
-------------------	-----------------------------	-----------	---	---------------------------

SPACE REQUIREMENTS			
Primary Office Space	# of Persons	Square feet	Total Square feet
Employees / Staff	27	3,400	3,400
			0
			0
Office Support Area		Square feet	Total Square feet
Reception Area		84	84
Mail Room		120	120
Break Room		120	120
Conference Room		150	150
Circulation		969	969
Warehouse		Square feet	Total Square feet
Warehouse Storage		500	500
		-	-
Ware yard		Land (acres)	Total Land (acres)
if applicable		0	0
Parking	Outdoor:	Government:	3
		Visitor:	5
		Employee:	70
	Indoor / Secured:	Government:	22
Special Requirements			Total Square Feet
IT Server Room			100
Vault (secured file storage)			500
Circulation			150
			750
Total Space Required:			6,093
Total Personnel:			27
Total Square feet per person:			179

Term of Occupancy		
From: (Mo & Yr.)	To: (Mo. & Yr.)	No. of Years Firm Term
10/1/2014	9/30/2019	5

To:	General Services Administration Real Estate and Acquisition Admin.	Type of Request
No., Street		<input type="checkbox"/> Initial
City & State		<input type="checkbox"/> Expansion
Zip Code		<input checked="" type="checkbox"/> Continuing Requirements
		<input type="checkbox"/> Reduction
From:	DOI / Bureau of Indian Affairs	
Agency:	Real Property Leasing	
No., Street	1849 C Street, NW	
City & State	Mail Stop: 3647-MIB, Washington, DC	
Zip Code	20240	
For:		
Agency:		
No., Street		
City & State		
Bureau Code:	1409	
Geographic Service Area		
Delineated Area		

Agency Certification

I certify that this request is accurate and complete; is for the minimum amount of space required; is in compliance with FPMR 101-17, including all laws and executive orders governing the location of space; and that funds are available for payment of rent, moving expenses, telecommunication expenses and any related reimbursables

Signature: _____ Date: _____

Print Name and Title: _____ Phone: _____

**Indian Affairs
RFS Handbook**

SPACE REQUIREMENTS WORKSHEET		This form must accompany, "Request for Space" form.		
Department/Bureau DOI / BIA		Prepared by		City and State
Agency/Office		Title		Organizational unit described in this space Staffing Requirements
Division		Date 4/20/2014		Page 1
Functional Title (include supervisory duties, if applicable)	Grade	Space Type	Enclosure Type	Square Feet Required
Employee Name or Vacant (if funded)				
		Private	Office	180
		Private	Office	150
		Open	Workstation	96
		Open	Workstation	96
		Open	Workstation	84
		Open	Workstation	84
		Open	Workstation	64
		Open	Workstation	64
		Open	Workstation	
Persons - Totals - Space		9		818

**Indian Affairs
RFS Handbook**

SPACE REQUIREMENTS WORKSHEET		This form must accompany, "Request for Space" form.		
Department/Bureau <i>DOI / BIA</i>		Prepared by <i>0</i>		City and State <i>0</i>
Agency/Office <i>0</i>		Title <i>0</i>		Organizational unit described in this space Staffing Requirements
Division <i>Forestry</i>		Date <i>4/20/2014</i>		Page 2
Functional Title (include supervisory duties, if applicable)	Grade	Space Type	Enclosure Type	Square Feet Required
Employee Name or Vacant (if funded)				
		Open	Workstation	
		Open	Workstation	
		Open	Workstation	
		Open	Workstation	
		Open	Workstation	
		Open	Workstation	
		Open	Workstation	
		Open	Workstation	
		Open	Workstation	
		Open	Workstation	
		Open	Workstation	
Persons - Totals - Space		9		0

**Indian Affairs
RFS Handbook**

SPACE REQUIREMENTS WORKSHEET		This form must accompany, "Request for Space" form.		
Department/Bureau <i>DOI / BIA</i>		Prepared by <i>0</i>		City and State <i>0</i>
Agency/Office <i>0</i>		Title <i>0</i>		Organizational unit described in this space Staffing Requirements
Division <i>Forestry</i>		Date <i>4/20/2014</i>		Page 3
Functional Title (include supervisory duties, if applicable)	Grade	Space Type	Enclosure Type	Square Feet Required
Employee Name or Vacant (if funded)				
		Open	Workstation	
		Open	Workstation	
		Private	Office	120
		Open	Workstation	
		Open	Workstation	
		Open	Workstation	
		Open	Workstation	
		Open	Workstation	
		Open	Workstation	
		Open	Workstation	
		Open	Workstation	
Persons - Totals - Space		9		120

**Indian Affairs
RFS Handbook**

SPACE REQUIREMENTS WORKSHEET		This form must accompany, "Request for Space" form.		
Department/Bureau <i>DOI / BIA</i>		Prepared by <i>0</i>		City and State <i>0</i>
Agency/Office <i>0</i>		Title <i>0</i>		Organizational unit described in this space Staffing Requirements
Division <i>Forestry</i>		Date <i>4/20/2014</i>		Page 4
Functional Title (include supervisory duties, if applicable)	Grade	Space Type	Enclosure Type	Square Feet Required
Employee Name or Vacant (if funded)				
		Open	Workstation	
		Open	Workstation	
		Open	Workstation	
		Open	Workstation	
		Open	Workstation	
		Open	Workstation	
		Open	Workstation	
		Open	Workstation	
		Open	Workstation	
		Open	Workstation	
		Open	Workstation	
		Open	Workstation	
Persons - Totals - Space		9		0

**Indian Affairs
RFS Handbook**

SPACE REQUIREMENTS WORKSHEET		This form must accompany, "Request for Space" form.	
Department/Bureau DOI / BIA	Prepared by 0	City and State 0	
Agency/Office 0	Title 0	Organizational unit described in this space Office Support Requirements:	
Division 0	Date 4/20/2014	Page 5	
Office Support Space	Purpose and Specific Requirements	Type	Square Feet Required
Reception Area	Secure space at main entrance; controlled, secure access	Separate area at front of building	84
Mail Room	Central area for processing and distributing mail	Located in administration area	120
Break Room	Centralized space for breakroom, lunch preparation and vending, etc.	Requires plumbing	120
Conference Room	Meeting space for all staff. Typically 15 people x 10 SF per person.	Conference room with doors for privacy	150
Total Space			474

**Indian Affairs
RFS Handbook**

SPACE REQUIREMENTS WORKSHEET		<i>This form must accompany, "Request for Space" form.</i>	
<i>Department/Bureau</i> DOI / BIA	<i>Prepared by</i> 0	<i>City and State</i> 0	
<i>Agency/Office</i> 0	<i>Title</i> 0	<i>Organizational unit described in this space</i> Warehouse and Wareyard:	
<i>Division</i> 0	<i>Date</i> 4/20/2014	Page 7	
Warehouse / Wareyard	Purpose and Specific Requirements	Type	Square Feet Required
General Storage Area	Dedicated area for bulk supplies, equipment, furniture, etc. Recycle / re-use area	Storage	500
Total Space			500

Attachment 4 – GSA Needs Assessment Questionnaire



U.S. General Services Administration

Needs Assessment Questionnaire

Instructions: GSA associate contacts the customer to jointly develop the necessary requirements needed prior to a lease or A/E design award. This process was designed for the GSA associate and should not be sent to the customer. Prior to contacting the customer representative, assemble as much of the following information as is available.

GSA Associate: _____

GSA Region: _____

I. CUSTOMER INFORMATION

Federal Agency: DEPARTMENT OF THE INTERIOR

Department and/or Branch: INDIAN AFFAIRS

AB Code(s): 1409

Customer Representative(s): Kim Covington

Position(s)/Title(s): Lease Contracting Officer

Phone Number: 202 / 208-6188

Mobile Number: 770 / 595-6629

Fax Number: _____

E-Mail: Kim.Covington@bia.gov

DUNS*: _____

TAS**: _____

Authorized to approve: *If no, please note authorized approving official in space provided*

Formal Requirements Document yes no _____

Project Management Plan yes no _____

Customer Changes yes no _____

Funding yes no _____

II. BACKGROUND INFORMATION ON CURRENT SPACE

Location of Current Assignment: _____

Existing Rentable Square Feet: _____ RSF

Existing Usable Square Feet: _____ USF

III. DOCUMENTATION

Attach a copy of the following items to this document:

Staffing List/Headcount Data
This list should include each authorized staff member's position/title and grade (if applicable).

Organization Chart

Customer Space Standards
Check internally or have customer provide national space standards that govern the procurement and design of space.

Customer Mission and/or Initiatives
Check internally for customer mission and any new initiatives (RAMs or NAMs).

Obtain a copy of the following items if available and/or applicable:

- Floor plans of existing space
- Systems furniture installation drawings

IV. OBJECTIVE

1. What is the objective or purpose of the project or move?

2. Does the customer have any special constraints or objectives related to the new requirements that we should know about?
 - Budget: _____
 - Resources
 - Schedule
 - Organizational Change
 - Mission Change
 - Other
3. How does the customer define success (customer priorities)?
(e.g.: on budget, on schedule, cutting edge design, better location, more efficient use of space)
Locating space to meet agency requirements while meeting current utilization rates, thresholds, and mandates outlined by OMB and Rhea Suh, in particular to the efficient use of space.

V. NEW SPACE AND DELINEATED AREA

Date Space required: _____ Square Footage required: _____ usf
(not necessarily lease exp date) (if not determined yet, enter TBD)

1. How was this determined?
Current need
2. Has the customer already established a specific delineated area for this requirement?
Yes No *If yes, what is it?*
CBD
3. Does the customer have any special external adjacency requirements?
Yes No *If yes, what are they?*

4. Will the customer be moving existing furniture? Yes No
If yes, have you investigated the cost of moving vs. purchasing?

5. Does the customer have any sustainability goals beyond the existing regulations, existing laws and Executive Orders in effect? Yes No *If yes, what are they?*

6. Does the customer wish for GSA to assist with any of these ONE GSA Real Estate Services:

- | | |
|--|---|
| <input type="checkbox"/> IT/Network and Telecommunication Services | <input type="checkbox"/> Furniture and Personal Property Disposal |
| <input type="checkbox"/> Local and Long Distance Telephone Service | <input type="checkbox"/> Office Equipment Acquisition |
| <input type="checkbox"/> Furniture Acquisition | <input type="checkbox"/> Security Products and Services |
| | <input type="checkbox"/> Move Coordination |

If yes – note what is known about the requirement and contact your FAS counterpart.

VI. WORKSPACE REQUIREMENTS

BUSINESS OVERVIEW

1. Provide an overview of what your organization does and the kind of work that will be conducted in the new space (typical office, customer facing, etc.).

2. How do employees typically work? (in teams, individually, mainly offsite, etc.)

3. Does the customer have any telework programs and/or are staff often away from their desk or out of the office as part of their normal work?

4. Does the customer utilize any mobile work technologies such as laptop computers, wireless networks, VOIP phone system, or other mobile communication devices? If not, would they provide any business advantage in the future?

5. What works with the current space?
6. What doesn't work with the current space?

INDIVIDUAL WORKSPACE

1. Indicate the quantity of staff and other personnel you anticipate requiring each type of individual workspace.

Federal Contractor Other (e.g., visitors, students)

Private Offices:

Workspaces:

Total Staff:

1a. Can any of these individual workstations be shared by one or more person? If so, please describe below.

2. Describe the types of work that people do in their workspaces, including computer and phone, types of documents/materials needed, visitors, etc.

3. Has the customer established workstation or office typicals? Yes No
If yes, what are the footprint sizes for them? (i.e., 6x6, 6x8, 8x8, 7x9)

3a Are these typicals adequate?

GROUP WORKSPACE

1. Which internal groups need to be located near each other or near a particular support need (lobby, centralized storage, etc.)?

2. Describe the nature and frequency of meetings that occur between staff or with other outside agencies or customers (informal and spontaneous, scheduled, large/small, etc.)

3. Are your current meeting spaces adequate for these needs (number, size, features)?

4. Does the customer need conference rooms or training areas? Yes No

<i>Room Name</i>	<i>Typical Meeting Size</i>	<i>Meeting Frequency</i>	<i>Video Conferencing</i>	<i>Room Currently Exists?</i>	<i>Current Performance?</i>
_____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	_____
_____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	_____
_____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	_____
_____	_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	_____

5. What office support does the customer require?

- Reception
- Filing
- Bookshelves
- Mail Room/ Mail Station
- Copiers
- Fax
- Shared Equipment Stations

Define and quantify these requirements:

- _____
6. Does the customer require a server room? Yes No
If yes, what is known about the requirement?

6a. Does the customer require advance set-up of server room? Yes No
If yes, how far in advance of occupancy? _____

7. Does the customer require storage space? Yes No
If yes, what is known about the requirement?

- _____
8. Does the customer have any spaces that require special construction or maintenance? Yes No
If yes, what is known about the requirement?

Floor load must accommodate (x) 4-drawer Fire King file cabinets.

BUILDING FEATURES

1. Must the space be located on a particular floor of a building? Yes No
If so, where and why?

Contiguous, adjacent floors. In addition, see floor load note above.

2. Must the space be contained in one contiguous block without being split by a public corridor? Yes No
3. Has the customer established a column spacing requirement? Yes No
If yes, what is it?

- _____
4. Does the customer have any special HVAC requirements? Yes No
If yes, please explain.

Server room ventilation and cooling: TBD

BUILDING SUPPORT SPACES

1. Does the customer need any requirements related to access to:

Food Service: _____

Fitness Center: _____

Credit Union: _____

Onsite Health Unit: _____

2. Is a laboratory or clinic area required? Yes No
If yes, what is known about the requirement?

- _____
3. Does the customer require space for antennas? Yes No
If yes, what is known about the requirement?

- _____
4. Does the customer require any type of ware yard (loading dock, etc.)? Yes No
If yes, what is known about the requirement?

Rele:
New

Fenced and controlled access wareyard will be required if official parking space for GOVs is not available.

5. Does the customer have any special requirements regarding handling or disposal of hazardous waste? Yes No
If yes, what is known about the requirement?

VII. PARKING

1. Does the customer require parking? Yes No
- 1a. Number of secured parking spaces required:
What is the nature of your security requirement (gate controlled, fence, visually private, other)? _____
- 1b. Number of un-secured spaces required:
- 1c. Does the customer require that any parking be available within a specific walking distance from the site? Yes No
How many spaces?
How many blocks?
- 1d. Does the customer have any specific requirements related to this parking? Yes No
If yes, what is known about the requirement? _____
2. Does the customer require bicycle parking? Yes No
If yes, what is known about the requirement?

VIII. BUILDING OPERATIONS

Customer Hours of Operation

Monday - Friday: From 7:00AM To 6:00 PM

Saturday: From _____ To _____

Sunday: From _____ To _____

Does the customer require after hours access/utilities? Yes No

If yes, please explain.

If yes, frequency: (hours/day) _____ (days/week) _____

Are after hours or daytime cleaning services required? Daytime After Hours

IX. SECURITY

1. Do you feel the level of security is appropriate now? Yes No
If not, what is the right level?
FPS/DHS to advise
2. Has the customer instituted changes in their security requirements since they took occupancy of the current location? Yes No
If so, what are they?
FPS/DHS to advise
3. How does the customer want to manage employee access to the space?
Key card access with main entrance for visitors and deliveries with receptionist / guard desk.

4. How does the customer want to manage visitor access to the space?

5. Does the customer have any other security requirements? Yes No
If yes, what is known about the requirement?

X. ADDITIONAL NOTES

Satisfactory public transportation must be available within 2 blocks of space offered.
Agency to advise of any additional notations.

* Dun and Bradstreet Universal Numbering System (DUNS) number (also referred to by GSA as the Business Partner Network (BPN) Number): Required by Treasury for Intra-governmental Payment and Collection System (IPAC), this provides a standardized interagency transfer of funds between GSA and customers' accounts for space charges. (This requirement is defined in OMB Memorandum M-03-01 http://www.whitehouse.gov/omb/memoranda_m03-01)

** Treasury Account Symbol (TAS) - Required by Treasury: The TAS is an identification code assigned by Treasury, in collaboration with OMB and the owner agency, to an individual appropriation, receipt, or other fund account. (These accounts are defined in I TFM 2-1500 <http://www.fms.treas.gov/tfm/vol1/v1p2c150.html>)

For the Customer letter explaining the DUNS/TAS requirements please see:

<https://gsa.box.net/shared/static/vccofho7v1.pdf>