



U.S. DEPARTMENT OF STATE  
BUREAU OF OVERSEAS BUILDINGS OPERATIONS

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# OBO Industry Days Highlighting the PRE Directorate

Planning and Real Estate

June 20, 2024

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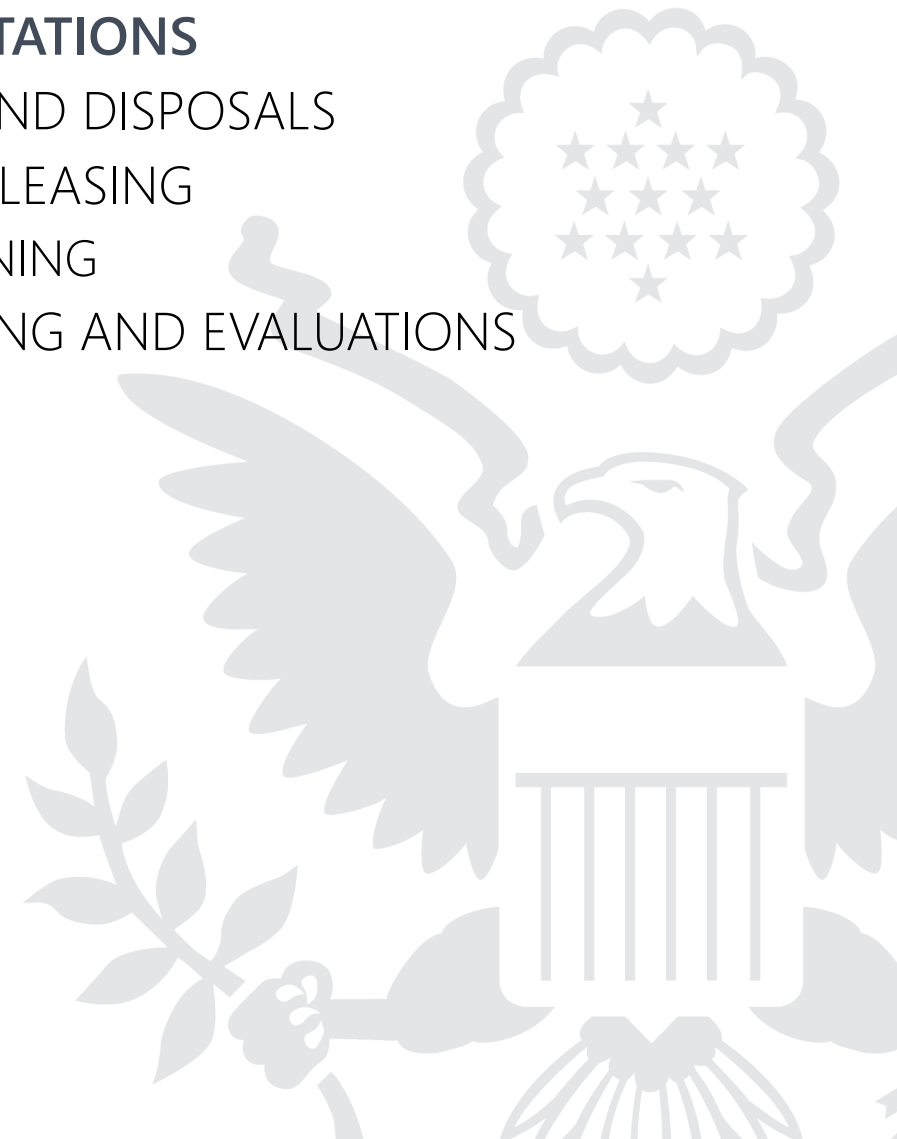
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## Opening and Introduction

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Meghan Sebold | Acting Director | External Affairs | OBO

# Introductions



**Meghan Sebold**

Acting Director | External Affairs | OBO



**Ambassador Moser**

Director | OBO



**Blondell Tayler**

Contract Officer | Facilities, Design & Construction | Office of Acquisitions Management | Bureau of Administration



**Victoria Hartke**

Managing Director | Planning and Real Estate | OBO



**Jason Dallara | Office Director**

Office Director | Acquisitions and Disposals (OAD) | OBO



**Michael Lash | Office Director**

Office Director | Real Property Leasing (RPL) | OBO



**Erin Crudden | Office Director**

Office Director | Strategic Planning (OSP) | OBO



**Courtney McCunney**

Acting Office Director | Master Planning and Evaluations (MPE) | OBO



**Lauren Luckett**

Strategic Industry Partnerships | External Affairs | OBO



# 2.0

## Welcome Message

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Ambassador Moser | Director | OBO

# Director Moser

Appointed Director of the Bureau of Overseas Buildings Operation (OBO) on October 25, 2021

Previously Acting Director and Principal Deputy Director

Served as the U.S. Ambassador to Kazakhstan from 2019-2021 and to the Republic of Moldova from 2011-2015

Diplomatic career started in 1984, with Washington roles as Deputy Assistant Secretary for Logistics Management, Director of Global Support Services and Innovation, Deputy Executive Director for European and Eurasian Affairs, Post Management Officer in the Bureau of Near Eastern and South Asian Affairs, and Political-Military Affairs Officer in the Bureau of Political-Military Affairs

Overseas assignments include positions as Management Counselor at U.S. Embassy Kyiv, Energy Attaché/Economic Officer and Management Officer at U.S. Embassy Almaty, Administrative Officer at U.S. Embassy Paramaribo, Financial Management Officer at U.S. Embassy Cairo, and Consular Officer/Staff Assistant at U.S. Embassy Bonn

Originally from North Carolina, earned a B.A. in Political Science from the University of North Carolina at Chapel Hill





# 3.0

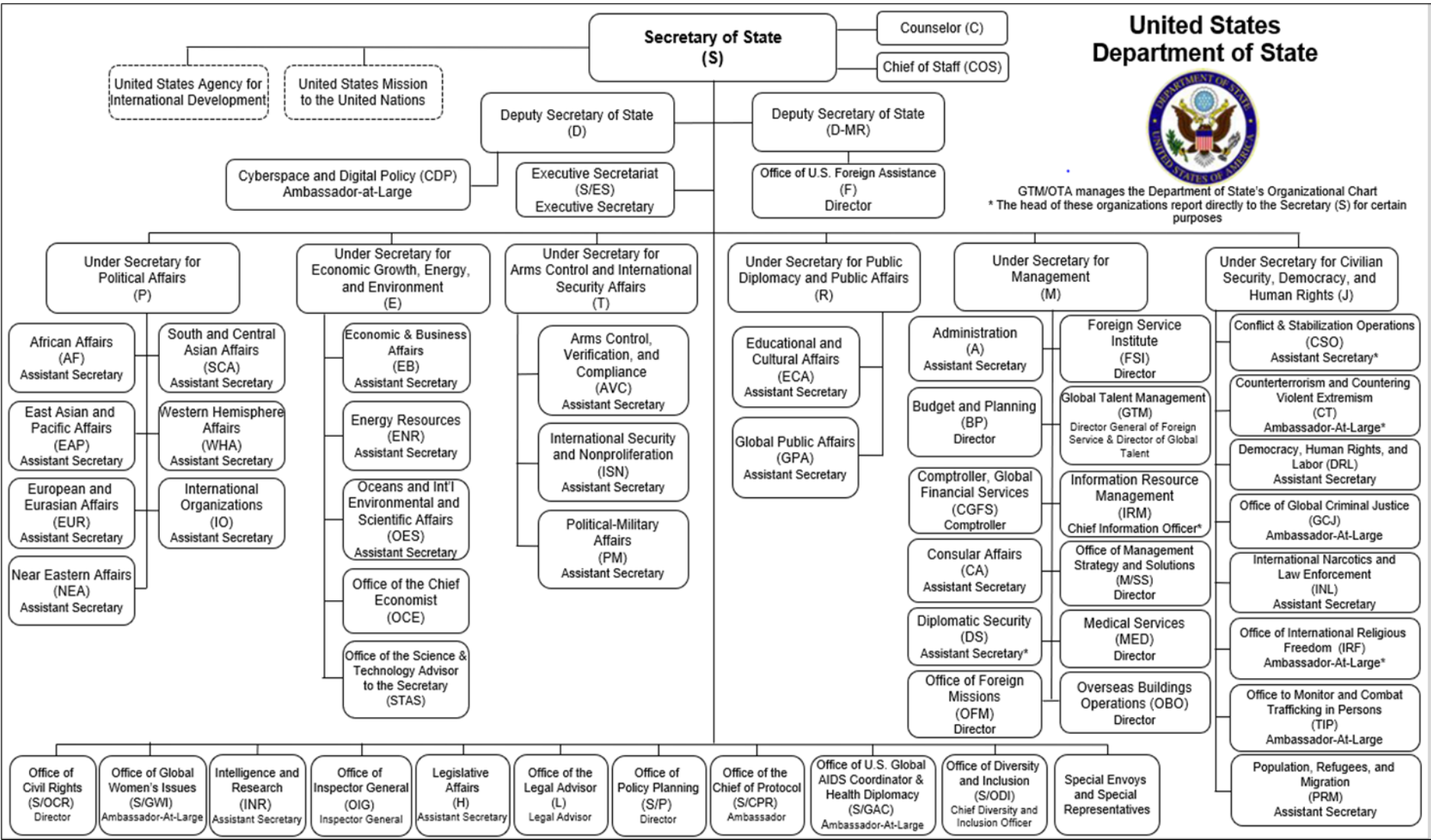
## Procurement Process and Overview

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Blondell Taylor | Contracting Officer – Facilities, Design & Construction – Major Support Branch | AQM



# The U.S. Department of State





# The Under Secretary for Management (M)



The Under Secretary for Management is the State Department's representative on the President's Management Council and is the Department official responsible for implementing the President's Management Agenda (PMA). The PMA is a set of management initiatives designed to make government more citizen-centered, effective, and efficient.

- **Bureau of Administration**
- Bureau of Budget and Planning
- Bureau of Consular Affairs
- Bureau of Diplomatic Security
- Bureau of Global Talent Management
- Bureau of Information Resource Management
- Bureau of Medical Services
- **Bureau of Overseas Buildings Operations**
- Bureau of the Comptroller and Global Financial Services
- Director of Diplomatic Reception Rooms
- Foreign Service Institute
- Office of Foreign Missions
- Office of Management Strategy and Solutions

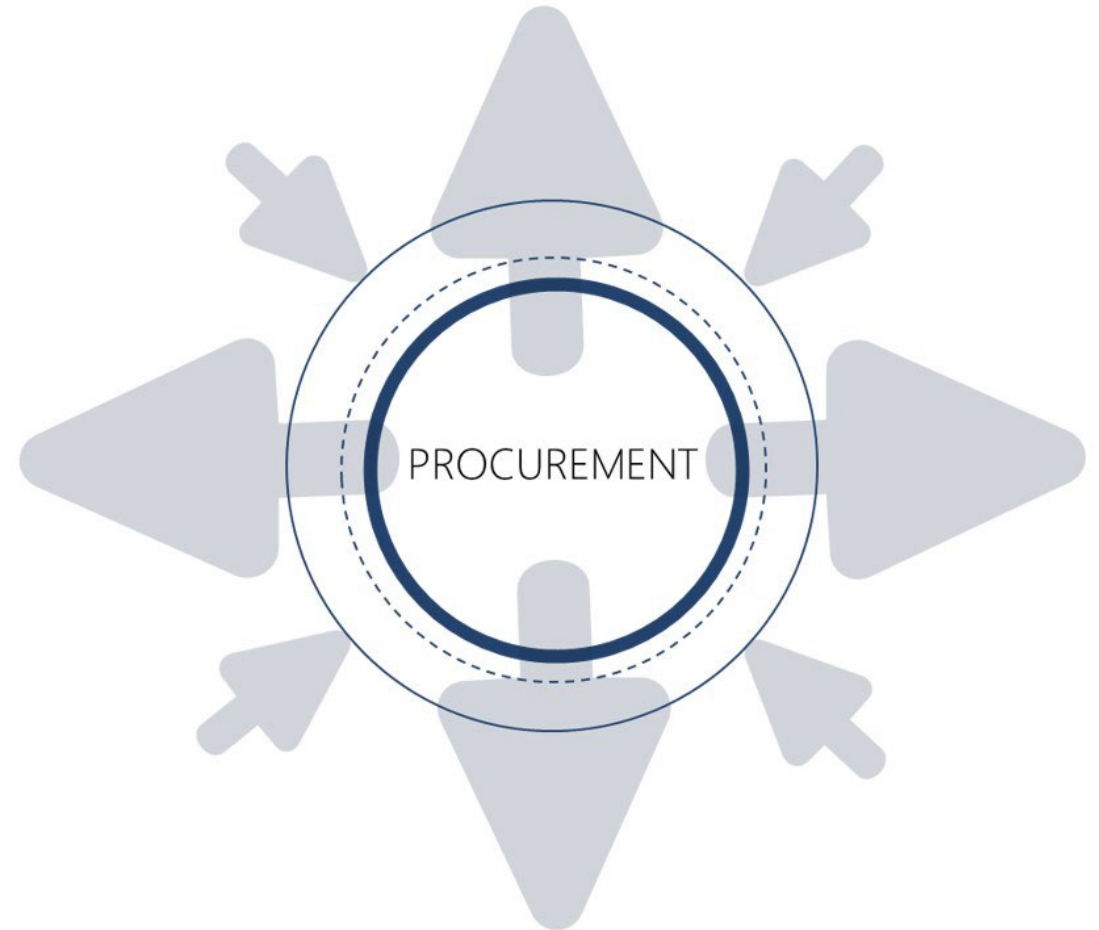
# Bureau of Administration, Office of the Procurement Executive (OPE)

## EXECUTIVE MISSION

- To provide management direction and leadership over Department-wide acquisition and federal assistance policies and the full range of acquisitions and federal assistance management services.

## EXECUTIVE VISION

- OPE delivers flexible solutions through a responsive and knowledgeable workforce that elevates the Acquisition Experience.



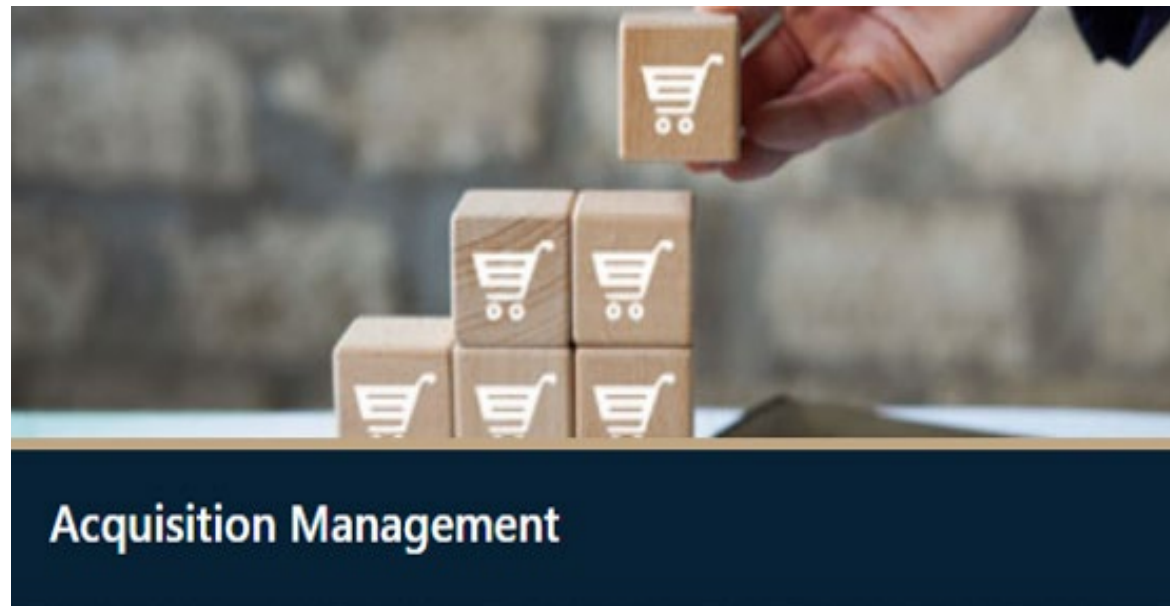
# Office of Acquisitions Management (AQM)

## Office of Acquisitions Management (A/OPE/AQM)

- Manages, plans, and directs Department's acquisition programs
- Conducts contract operations in support of activities

## Facility, Design, and Construction Division (A/OPE/AQM/FDCD)

- Establishes acquisition agreements for logistics requirements abroad and OBO requirements with the private and public sectors



# Real Estate Appraisals and Brokerage Services Opportunities



**BROKERAGE SERVICES:** The Department of State (DOS) from time to time sells (or otherwise disposes of) real property overseas and often chooses to do so by engaging the services of a real estate brokerage firm. DOS uses real estate brokerage services on a global basis, for use on an as-needed basis, when a determination is made that a broker should be used for the marketing and sale of a property. The broker's responsibility is to find ready, willing, and able buyers to purchase the properties specified in individual delivery orders at the maximum net proceeds of sale to the USG.

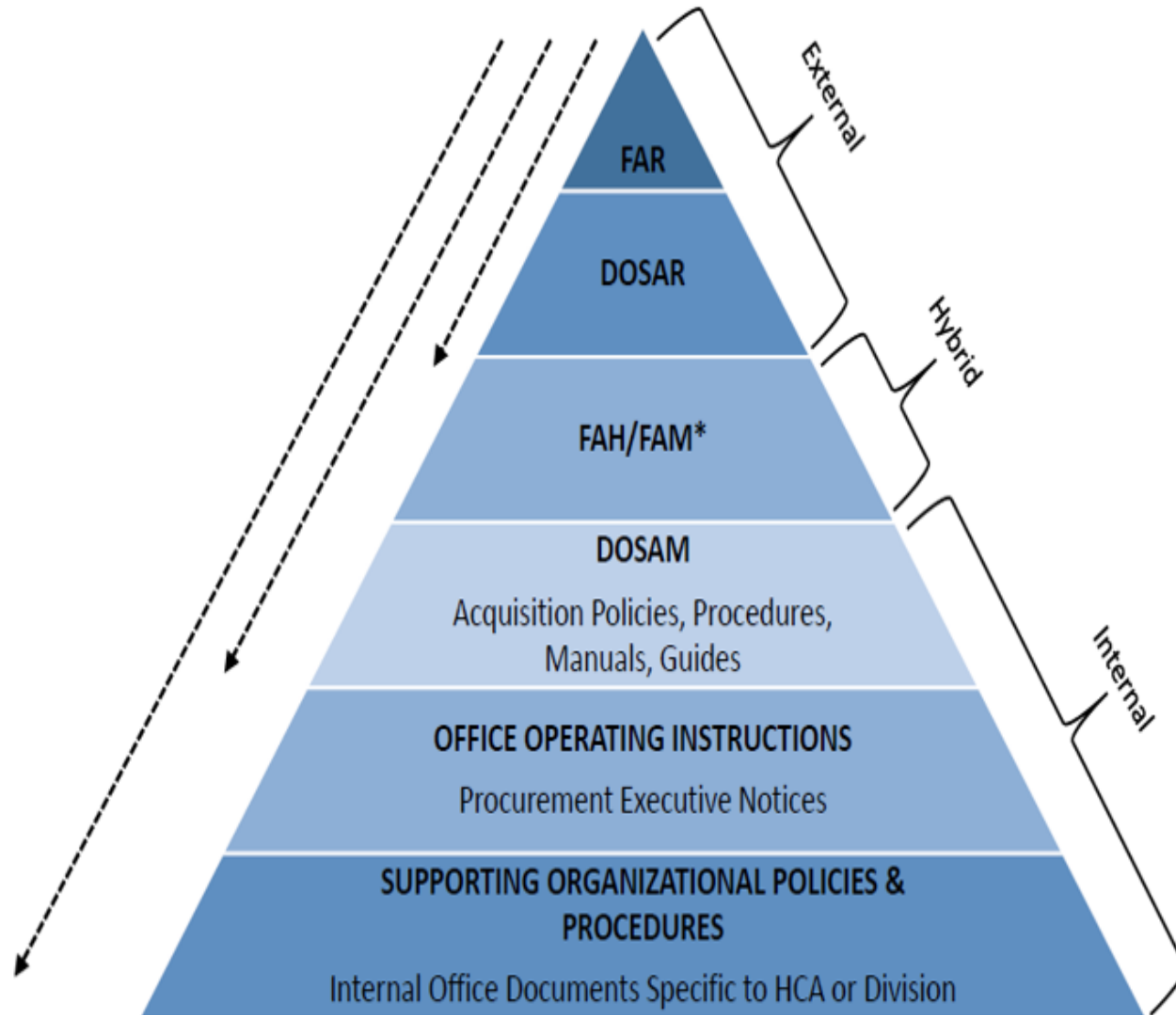


# Real Estate Appraisals and Brokerage Services



**APPRAISALS SERVICES:** The Department of State (DOS) uses international real estate appraisal and advisory services to acquire and lease properties internationally. Services are usually on an as needed basis. Services may be required in one or more locations at the same time. (DOS) portfolio includes undeveloped land, office, warehouse, recreation, residential (single and multi-family), motor vehicle facilities, and mixed-use properties, related to the U.S. Government's (USG's) overseas mission. Assignments are located in nearly every country throughout the world.

# AQM Procurement Regulation Sources for DOS Requirements



- **FAR part 12:** Acquisition of Commercial Products and Services
- **DOSAR part 612:** Acquisition of Commercial Items
- **FAR part 15:** Contracting by Negotiation

# Commercial Items (FAR Part 12)

## – FAR Part 12, Acquisition of Commercial

**Items;** Prescribes policies and procedures unique to the acquisition of commercial items.

- It implements the Federal Government's preference for the acquisition of commercial items contained in Title VIII of the Federal Acquisition Streamlining Act of 1994 (Public Law 103-355).
- Acquisition policies more closely resemble those of the commercial marketplace and encouraging the acquisition of commercial items and components.
- May be acquired using the streamlined procedures set forth in FAR Part 12 – Subpart 12.6.

## – Common Applications:

- Commercial products and services
- Information Technology (IT) product and services
- Environmental Remediation Services
- Cyber services and solutions
- Cloud services and solutions
- Software licenses
- Telecommunications and wireless services
- Advisory and Assistance Services
- Facility Management



# FAR 15: Contracting By Negotiation

- FAR Part 15 describes the procedures for competitive and non-competitive open market acquisitions exceeding the Simplified Acquisition Threshold (SAT). Open market is defined as products or services not available from required sources of supply, such as GSA schedule contracts, outlined in FAR Part 8.
- Request for Proposal (RFP) is issued defining the requirement and requesting technical and pricing information. It also describes how the award decision will be made.
- AQM responds to questions from potential offerors with answers and solicitation amendments as necessary. Questions and answers are forwarded to all potential offerors.
- Proposals are submitted by an established time and date.
- Proposals are evaluated by the Government based on the evaluation criteria in the RFP- e.g. technical, cost/price, past-performance.
- If necessary, negotiations (discussions) are held to resolve deficiencies and other issues, including price, with the offerors in the competitive range and revised proposals are submitted and evaluated.
- Contract(s) awarded to the successful offeror(s).



# Solicitation Structure

## RFP: Sections A-M, Part I

### Section A

- Standard Form (SF) 33
- Standard Form (SF) 1449

### Section B

- Pricing

### Section C

- Statement of Work, requirements

### Section D: Packaging and Marking

- Packaging, preservation and marking requirements

### Section E: Inspection and Acceptance

- Quality Assurance
- Office responsible for quality assurance

### Section F: Deliveries or Performance

- Time, place and method of delivery or performance

### Section G: Contract Administration

- Includes any required accounting and appropriation data and any required contract administration or instructions other than those in the RFP

# Solicitation Structure Cont.

## **Section H: Special Contract Requirements**

- Defense Base Act Insurance – certificates to be submitted to CO/COR before travel and maintained through performance of the project.
- Diplomatic Security Requirements
- Include specified section in ALL subcontracts
- Photographs need advance authorization from RSO, COR, and/or SSM.
- Public Release of Information Requests
- Basis for Equitable Adjustment
- 52.243-4 CHANGES (JUN 2007)
- 52.243-5 CHANGES AND CHANGED CONDITIONS (APR 1984)
- 52.243-7 NOTIFICATION OF CHANGES (APR 1984)

Part II – Contract Clauses: Section I

Part III – List of Documents, exhibits and other Attachments: Section J

Part IV – Representations and Instructions:

## **Section K: Provisions that require representations and Certifications**

## **Section L: Instructions, conditions, and notices to offerors**

## **Section M: Evaluations factors for award**

# Project Team Authority & Contract Changes

- **Only a Contracting Officer** has the authority to issue modification and authorize additional work not included in Contract/Task Order.
- The **Contracting Officer's Representative (COR)** and ACOR do NOT have authority to modify task order or contract terms.
- **Personnel at Post** do NOT have the authority to modify or request additional work under this task order.

## Changes:

- If there is ANY change requested by anyone other than the CO, the contractor shall immediately bring this to the attention of the CO.
- If differing site conditions arise, the contractor shall notify the COR and the CO.





# 4.1

## Project Acquisitions & Contractor Selections

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# Current Project Delivery Methods



**Complexity, environment, and urgency are evaluated in deciding a delivery method:**

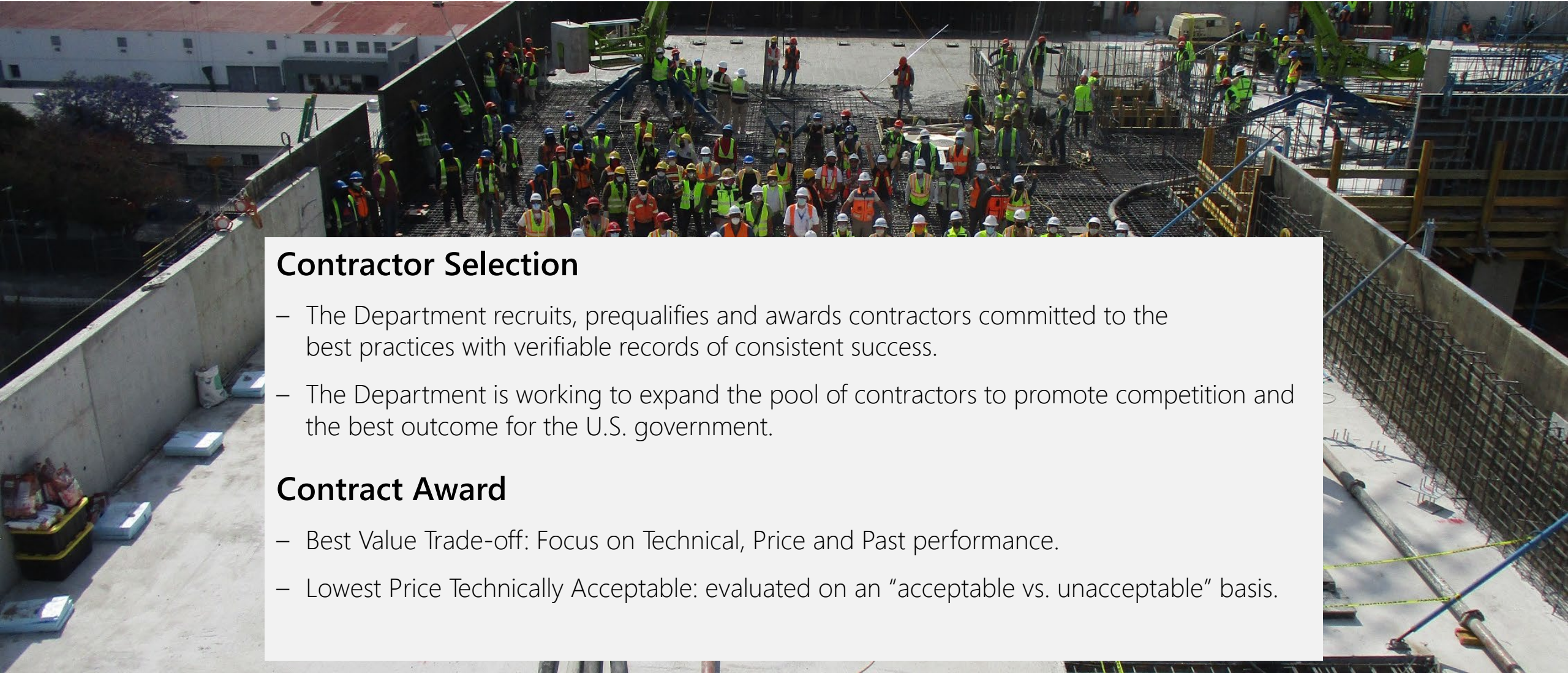
- Commercial Items FAR Part 12
- Contracting by Negotiation FAR 15
- Indefinite Delivery Indefinite Quantity (IDIQ) FAR 16

**Contact Types:**

- Fixed-Price
- Time & Materials
- Labor Hour



# Contractor Selection & Awards



## Contractor Selection

- The Department recruits, prequalifies and awards contractors committed to the best practices with verifiable records of consistent success.
- The Department is working to expand the pool of contractors to promote competition and the best outcome for the U.S. government.

## Contract Award

- Best Value Trade-off: Focus on Technical, Price and Past performance.
- Lowest Price Technically Acceptable: evaluated on an “acceptable vs. unacceptable” basis.



# OBO IDIQ Real Estate Opportunities with NAICS CODE

## **531210 - NAICS Code 531210 Offices of Real Estate Agents and Brokers**

- The Real Estate and Rental and Leasing Industry uses NAIC Code 531210.
- This code covers businesses and agents involved in the following practices:
  - Selling real estate on behalf of someone else.
  - Buying real estate for other people.
  - Renting real estate for another person.
- Some of the industries covered by this code include:
  - Real estate agencies and gents
  - The auction of real estate
  - Brokerages and brokers' office
  - Commercial and residential agencies

## **531390 Other Activities Related to Real Estate**

# How To Find Opportunities

Postings released via:  
[www.SAM.gov](http://www.SAM.gov)





# 4.0

## Introduction to PRE

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Victoria Hartke | Managing Director | Planning and Real Estate | OBO

# Victoria Hartke, Managing Director for Planning and Real Estate

Victoria R. Hartke returned to the Bureau of Overseas Buildings Operations in August 2016 as the Managing Director, having served previously as Realty Specialist and Team Lead

She received a Master of Law degree in International and Comparative Law, *summa cum laude*, from George Washington University, a Juris Doctor degree from the Penn State School of Law (Dickinson), and a Bachelor of Arts degree from Gettysburg College with a double major in Economics and French

She joined the Senior Executive Service in 2013 as the Director of the Office of Leasing for the U.S. General Services Administration (GSA) in the NCR

She serves as the OBO representative on the Department's Diversity and Inclusion Leadership Council, is a champion of the OBO DEIA Council and an active participant in the Department's iMentor Program





# Directorate of Planning and Real Estate (PRE)

- PRE plans and delivers safe, secure, functional, and resilient property overseas and uses data to empower the Department to achieve its mission.
- PRE strives to be the preeminent provider of planning and real property services, delivering outstanding and creative real estate solutions through a diverse and dynamic workforce.
- PRE is responsible for portfolio planning, capital investment decision-making and real estate transactions to manage an inventory of 25,000 properties with a replacement value of over \$80 billion.
- PRE interacts with tenant agencies to ensure their global space requirements are met and that all those serving overseas have appropriate housing.



# Directorate of Planning and Real Estate (PRE)

**PRE's fiduciary obligations to the overseas diplomatic corps and American taxpayers require collaboration with industry**

## IMPACTS

- NEW LEGISLATION
- CLIMATE AND RESILIENCE
- DATA AND TECHNOLOGY
- BUDGET CHALLENGES

## RESPONSES

- STRENGTHENING RELATIONSHIPS
- DEVELOPING NEW PROGRAMS
  - Capital Planning Process
  - Representational Facilities Program
  - Adaptable Accessible Housing Acquisition Program

## INNOVATIVE DELIVERY OF REAL ESTATE TRANSACTIONS

- **FOREIGN SERVICE BUILDINGS ACT** (22 U.S.C. § 292(A) (2021), *AS CODIFIED IN THE FOREIGN AFFAIRS MANUAL* (15 FAM 112.2), GRANTS OBO BROAD LATITUDE TO MANAGE ITS OVERSEAS REAL PROPERTY PORTFOLIO
- IN ADDITION TO TRADITIONAL METHODS OF LEASING, ACQUIRING, AND DISPOSING OF REAL PROPERTY, OBO LEVERAGES ITS AUTHORITIES AS CREATIVELY AND FLEXIBLY AS POSSIBLE TO PROVIDE RESIDENTIAL, REPRESENTATIONAL, OFFICE AND WAREHOUSE SPACE OVERSEAS
  - Joint venture
  - Build to Lease with Purchase Option
  - Share purchase
  - Exchange



5.0

## Office Presentations

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# 5.1

## Office of Acquisitions and Disposals (OAD)

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Jason Dallara | Office Director | Acquisitions and Disposals | OBO

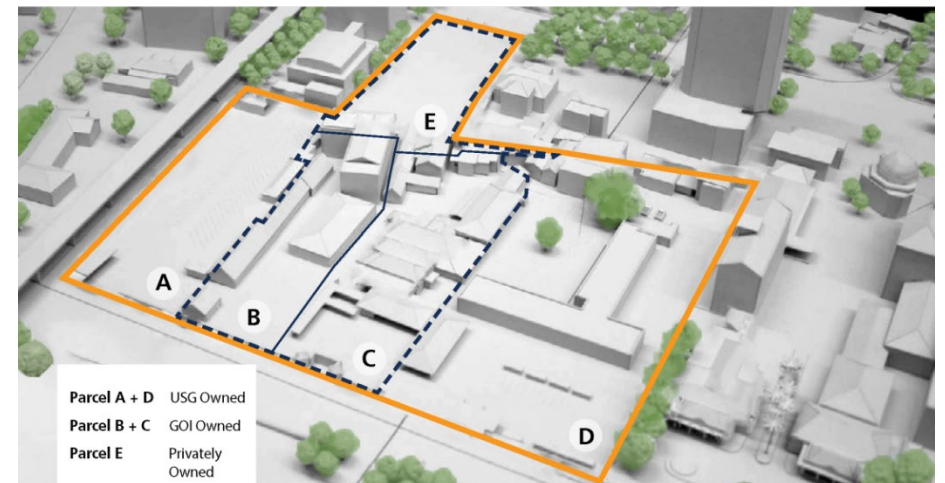
# Office of Acquisitions and Disposals (OAD)

## Site Acquisition Division

- Part of Capital Security Construction Program
- Leads land acquisition process for NECs/NCCs/NOXs
- Manages pipeline of 25+ site acquisitions (\$1+ billion in property values)
- Also pursues any ancillary land acquisitions

## Major Initiatives

- Adjacent Parcels – logical consequence of more stay-in-place solutions
- Site-Assisted BTLs



Upper: U.S. Embassy Jakarta; Lower: U.S. Embassy Jakarta site

# Office of Acquisitions and Disposals (OAD)

## Site Selection

- Context and location
- Operational requirements
- Location of host government, customers.
- Security requirements
- Representation
- Central business districts
- Central, transitional urban neighborhoods
- Takeaway --- > NEC Sites don't exist...we create them...



London NEC site



Upper: U.S. Embassy London site; Lower: U.S. Embassy Brussels site

## Contracting

- Negotiates contracts with seller (non-FAR)

## Due Diligence

- Technical (PDCS)
- Political/Administrative

## Congressional Notification

## Closing

## Post-Closing Actions



# Office of Acquisitions and Disposals (OAD)

## Asset Management Division

- Real Property Acquisitions
  - SHOP – Staff Housing
  - Representational / Functional
  - MSGR – OCO funded
- Real Property Dispositions
- Managing 50+ real estate actions
- Over \$1.5 billion in property values



## Major Initiatives

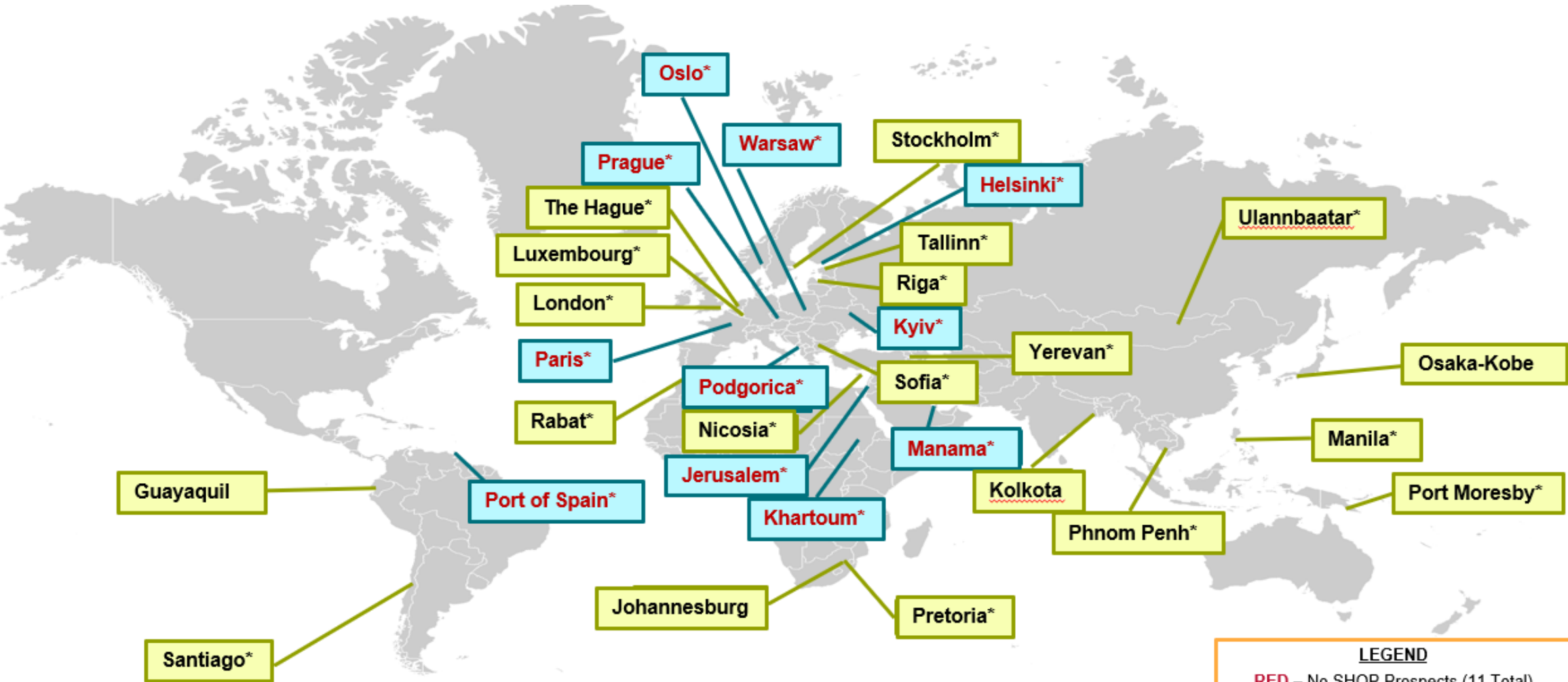
- Spending to \$0 effort
- Increased volume on housing purchases (and lessons learned)
- High-profile actions (Hamburg+)
- Joint Venture / Property Exchange (Seoul, Mexico City)



Left: Santiago Housing; Right: Vilnius Housing



# Staff Housing Opportunity to Purchase (SHOP)



**LEGEND**

**RED** – No SHOP Prospects (11 Total)

**YELLOW** – Active SHOP Action (20 Total)

\* – Embassy      Update 07/28/2022

U.S. DEPARTMENT of STATE  
UNCLASSIFIED

# Disposals

**The goal of the Disposal Program ==> achieve the highest sale price possible for the U.S. government's surplus real estate assets**

- Department has special authority to retain proceeds.
- Value Proposition
  - USG: Stewardship of taxpayers' assets (Congressional reports)
  - Post: Generate \$\$\$ for purchases
- High-Value Disposals
  - Mumbai, Oslo, Tel Aviv, and Hong Kong
  - Sealed bid, competitive process, and teamwork with post can yield great results.
- Special Disposals / Out Lease
  - Karachi RFI - former Con General Residence



Upper: Oslo Former Chancery; Lower: Hamburg Former Consulate



# IDIQ – Acquisitions and Disposals

## Acquisitions IDIQ

- Purpose – Support for international real estate acquisitions – searches, brokerage, support services
- Vendors – CBRE, JLL, Cushman Wakefield, Transwestern
- Renewal – Target Date late 2024/early 2025

## Disposals IDIQ

- Purpose – Support for international real estate disposals-brokerage (compete by percentage)
- Vendors – CBRE, Cushman Wakefield, Knight Frank, DTZ (now CW)
- Renewal – Target Date 2025





## 5.2

### Office of Real Property Leasing (RPL)

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Michael Lash | Office Director | Real Property Leasing | OBO



# Office of Real Property Leasing (RPL)

- **Global portfolio of 17,000 leases** – mainly residential and offices, warehouses, land
  - RPL is Department' central authority on global leasing and housing policy and regulations
  - Distributes over \$500 million directly for lease costs
  - Directly negotiate complex, high-cost and sensitive leases
- Contract Opportunities – International IDIQs for market surveys ,property searches, appraisals
- Dozens of service orders requested annually worth several million dollars

# Opportunities

## Staff Housing

- **2025-2026**
- **NAICS codes** – 531110 residential
- **Above market standards** for safety, security, and quality.
- **Walled compounds of** 30 -90 units, mixed sizes with amenities.
- **Option to Lease** – *Market driven pricing*
- **Build to Lease** – *Competitive bidding* with special requirements

## Housing Compound Opportunities

### EUROPE

- Bishkek
- Tashkent
- Almaty
- Pristina

### AFRICA

- Kampala
- Conakry
- Addis Ababa
- Lusaka
- Conakry
- Lusaka



# Opportunities

## Executive Housing

- 2025-2026
- **NAICS code** – 531110 residential
- **Ambassadors and Consul Generals**
  - High end “permanent” residences
- **Build to Lease** is more appropriate
- **Long term leases** and possible ownership

## Executive Housing Opportunities

- Chiang Mai -CGR
- Bangkok - CMR
- Tegucigalpa - CMR
- Dili - CMR



# Opportunities

## Offices and Warehouses

- **2025-2026**
- **NAICS code** – 531120 non-residential
- **Warehouses** 1,000 - 2,000 gsm, turnkey, stand-alone facilities
- **Build to Suit** - land leased from 3<sup>rd</sup> party
- **Build to Lease** - leased from developer
- **Office Fit Outs** – existing office buildings

## Opportunities

- Bissau – office fit out
- Lome – office/warehouse
- Douala – office fit out
- Kampala - warehouse







# 5.3

## Office of Strategic Planning (OSP)

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Erin Crudden | Office Director | Strategic Planning | OBO

# Office of Strategic Planning (OSP)

Knowledge Management Division manages all data related to OBO’s real property portfolio and develops tools that disseminate data to stakeholders so they can make informed decisions.



# Office of Strategic Planning (OSP)

Long-Range Planning Division manages programs related to capital and non-capital planning, defines project requirements and administers OBO's cost-sharing program, which provides over \$2 billion annually.



**PRIORITIZATION &  
SCHEDULING**



**PROJECT  
REQUIREMENTS**



**COST-SHARING**



# 5.4

## Office of Master Planning and Evaluations (MPE)

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Courtney McCunney | Acting Office Director | Master Planning and Evaluations | OBO



# Office of Master Planning and Evaluations (MPE)

The Master Planning Division coordinates a range of planning studies on behalf of the Department to **create an optimal real property portfolio balance** among U.S. diplomatic facilities and to produce **multidisciplinary options for the near, medium, and long-term development** of U.S. embassies, consulates, and selected residential compounds.

## PRODUCTS



- Business Case: Evaluations / Validation
- Department Initiatives
- Traditional Planning Products
- OBO Directorate Support

## ACTIVITIES



- Informing Capital Expenditures (CPP)
- Special Programs & Dept. Priorities
- Facility Analysis
- Planning Support Activities

# Office of Master Planning and Evaluations (MPE)

## **Evaluations Division (EV) informs leasing, acquisition, disposal & planning decisions with:**

- Market Value and Market Rent Analyses
- Business Case Analyses
- Feasibility Analyses
- Negotiation Support

## **Provides financial analyses for:**

- Representational Facilities Program (RepFac)
- Capital Planning Process (CPP)
- Adaptable Accessible Housing Acquisition Program (AAHAP)
- Planning Support

## **Providing real estate analytics to:**

- Other OBO Directorates
- Office of Foreign Missions
- A-Bureau
- Other U.S. government agencies

# Office of Master Planning and Evaluations (MPE)

- Potential need for real estate appraisal and advisory services.
  - Preparation of oral, narrative or form appraisals and other advisory reports such as notional values (similar to broker's opinion of value), rent studies, reports on real estate trends, highest and best use studies, feasibility studies, property searches, and other real estate consulting services as needed.
- Offers Due July 30, 2024
- Assignments may be in nearly every country throughout the world.

## **NAICS codes:**

- 531320 Offices Of Real Estate Appraisers
- 531210 Offices Of Real Estate Agents and Brokers
- 531390 Other Activities Related to Real Estate

# Opportunities

[Build with Us - United States Department of State](#)

<https://www.state.gov/build-with-obo/>





# 6.0

## Q&A

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Lauren Lockett | Industry Advisory | External Affairs | OBO

# Who We Hire



## Civil Service (CS)

Federal government employees within a wide range of disciplines



## Personal Services Contractor (PSC)

Directly contracted government employees without the same benefits as CS



## Foreign Service Specialist (FS)


Specialized professionals that represent the US and conduct diplomacy domestic and abroad



## Internships

Temporary employees working to gain skills (paid and unpaid)

# Connect with OBO



**in** USDOS-OBO  
**@** @STATE\_OBO  
**i** @STATE\_OBO  
**f** FACEBOOK.COM/STATEOB  
**O** OBOExternalAffairs@state.gov  
**G** STATE.GOV/OBO

## Working With Us

For Capabilities  
Conversation  
information, please  
register at:



## Careers

Join our talent  
network to receive  
communications  
about OBO  
opportunities and  
events:

