
Chapter 1: Purpose of the Desk Guide

PURPOSE

Over the past few years, Federal agencies have come to realize the importance of managing their real property assets so that optimum usage is attained, and maximum return/benefit accrues to the holding agency, the Government at large, and the public. This has led to increased reliance on long-range planning as the key determiner of what actions need to be taken with respect to acquiring and/or disposing of real property. The aim of this Desk Guide is to place in perspective the day-to-day activities of the DOE realty specialists as they relate to this overall focus on real estate asset management. From this basic-level perspective, the realty specialist should be able to see where a particular action fits into the real estate process spectrum, and better perceive the interrelationship of the various real estate tasks, and their impact on future planning and management.

The Desk Guide provides an overview of the essential functions in the real estate process, demonstrates how considerations of proper asset management are an integral part of real estate decision-making, and furnishes reference to more detailed guidance on specific activities and responsibilities. It is structured to reflect the normal sequence of events in the real estate process: planning, through acquisition and management, to disposal. Particular emphasis is placed on comprehensive land-use planning as a principal tool in effective asset management, and on the necessity of maintaining accurate real estate data in the Facilities Information Management System (FIMS).

RECOMMENDED USE

This Desk Guide is not intended as a prescriptive document outlining mandatory steps in the real estate process. Rather, it should be viewed and used as a means of quickly identifying material addressing matters or problems encountered in the course of real estate projects. Essentially, it provides the "what?" by identifying the central actions and procedures of the DOE real estate process. The "how?", the detailed approaches and methodologies, are contained in the various documents and forms referenced in the desk guide, the majority of which are in the guide's appendices.

The Guide also serves as an educational tool by covering the entire real estate process. It provides current realty specialists with a general familiarization of the process, and new personnel with a concise description of the responsibilities and considerations they will face as realty specialists. While the guide cannot address the numerous courses of action that might be pursued by realty specialists in carrying out their duties, it should enable them to view possible actions in light of the standard procedures and steps which are outlined.

STRUCTURE

The chapters in the Desk Guide are arranged to follow the normal sequence of events in the "cradle (planning/acquisition) to grave" (management/disposal) real estate process. Each chapter opens with an explanation of the processes and procedures encompassed by the chapter title. Within each chapter, the process for the various types of actions within a given category are briefly explained. In addition, each chapter identifies responsibilities and legal obligations, and indicates what forms and documents should be employed in completing an activity.

The Desk Guide does not attempt to explain the processes in detail. That is not its purpose. It identifies the key steps normally encountered in such activities as providing space and facilities or disposing of property, and then provides references to material which covers the topic in more detail. The citation will generally be to documents which are included in the appendices to the Desk Guide.

The Desk Guide's loose-leaf format is designed to allow necessary changes to the text resulting from legislative changes, Federal Management Regulation, etc. Additionally, this format will permit users to insert additional information concerning a particular subject.

Referenced Documents

With the institution of the new DOE Order 430.1B, **Real Property Asset Management (RPAM)** initiatives (see DOE Order 430.1B, Appendix 1-1), the previous existing orders and directives addressing the various real estate operations were phased out. Much of the information, processes, and procedures contained in these orders and directives remains usable as a basis for developing courses of action. This is particularly true of former order DOE Order 4300.1C, (Appendix 5-1) **Real Property Management and the United States Department of Energy Leasing Handbook (1990)**. They describe in useful detail the elements that

should be considered in the execution of real estate project tasks.

In addition, a number of Good Practice Guides covering real estate-related subjects, such as site selection and comprehensive land-use planning, have been issued prior to the initiation of the RPAM process and can be found in the Appendix. Again, these are not policy directives, but tools to assist field office personnel and contractors in performing their duties.

Thus, while no longer mandatory for real estate operations, these documents, as well as others, provide useful information, guidance and insight, and are referred to frequently in this Desk Guide.