



LAC-2013-04

September 30, 2013

MEMORANDUM FOR REGIONAL COMMISSIONERS, PBS
REGIONAL LEASING SERVICES OFFICERS

FROM: JAMES C. WISNER
ASSISTANT COMMISSIONER FOR OFFICE OF LEASING - PR

JCW

SUBJECT: Appendix B: Lease File Checklists

- 1. Purpose.** This Lease Acquisition Circular (LAC) issues the Leasing Desk Guide (Desk Guide) Appendix B, Lease File Checklists.
- 2. Effective Date.** This LAC and attachments are effective immediately.
- 3. Applicability.** This LAC and its attachments are mandatory and apply to all General Services Administration (GSA) real property leasing activities and to activities delegated by GSA to other Federal agencies.
- 4. Cancellation.** Realty Services Letter PQ-2005-06, Revised Lease File Checklist and Guidance, is canceled.
- 5. Instructions and Procedures.** Instructions and procedures are attached.

Attachment 1, LAC-2013-04 Summary and Filing Instructions

Attachment 2, Loose Leaf Leasing Desk Guide

LAC-2013-04 Summary and Filing Instructions

Lease Acquisition Circular (LAC) 2013-04 issues the policies listed below:

Leasing Desk Guide Appendix B, Lease File Checklists

1. This appendix establishes lease file checklists for the following leasing models:

- Simplified Lease Acquisition Model
- Streamlined Lease Model
- Succeeding Lease, Superseding Lease Model
- Standard Lease Model
- On-Airport Lease Model

These checklists provides a reference point for all tasks/documentation necessary to complete a lease acquisition and should be used in coordination with the Leasing Desk Guide, which explains the policy requirements for each task.

2. GSA associates can access an excel version of these lease file checklists on the Leasing Desk Guide webpage on PBS Insite.

3. In the near future, the GSA PBS Office of Leasing will be incorporating live hyperlinks from the specific line items in Appendix B's lease file checklist to the appropriate Leasing Desk Guide section providing policy guidance on that specific line item.

4. GSA will be developing additional lease file checklists for each of the various lease actions, such as space relinquishment, lease buyout, lease expansion, lease extension, and lease alterations. Once complete, we will incorporate these additional lease file checklists into Leasing Desk Guide Appendix B, entitled "Lease File Checklists."

5. LAC-2013-04 issues a new set of Lease File Check List(s) for each Lease Reform Model. However, current G-REX Lease File Check Lists are based on earlier versions of the Lease File Checklist from the National Office of Leasing Google site. G-REX will implement the new LAC Lease File Check Lists in the Spring of 2014. Current G-REX users should continue to use the existing G-REX Lease File Checklists. Regions that have not yet migrated to G-REX must use the Lease File Checklist established by this LAC.

LDG Filing Instructions

Part	Remove Pages	Insert Pages
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LOOSE-LEAF LEASING DESK GUIDE

The Desk Guide issuances follow this page.



APPENDIX B:

Lease File Checklists

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1. Overview

- a. PricewaterhouseCoopers LLP (PwC) prepared an FY 2000 Management Letter under contract to the Office of Inspector General (IG) that addressed leasing. The leasing matter was included in the IG's Report Number A001012/B/F/F01012 and transmitted by the Regional Inspector General for Auditing to the Acting Commissioner on May 29, 2001.
- b. PwC "reviewed the leasing files to ensure the files were properly documented" and found some "discrepancies." A small percentage of the files did not include either copies of newspaper advertisements or price negotiation documentation. Accordingly, the report recommended that PBS "Establish a standardized contract file format in accordance with the GSAM so that individual pieces of documentation can be located more easily." PBS management agreed with the recommendation and, in October 2001, issued guidance to Leasing Specialists instructing them to use the lease file checklist to organize lease files and to include the lease file checklist in the lease file. In addition, PBS provided a guidance document to be used in coordination with the Checklist and that explains the policy requirements for each task.
- c. In June 2012, the GSA PBS Office of Leasing issued templates for Request for Lease Proposals (RLP) and Lease for the models that were developed through the PBS Lease Reform initiative. Lease models have tailored the lease acquisition documents to the size, complexity, and security level of the lease transaction. This includes dividing the solicitation for offers into two documents, a Request for Lease Proposals (RLP) and Lease for each model except the On-Airport model that does not use an RLP.

The five models are:

- Simplified Lease Acquisition Model
- Streamlined Lease Model
- Succeeding Lease, Superseding Lease Model
- Standard Lease Model
- On-Airport Lease Model

2. Lease File Checklists

This appendix establishes lease file checklists for the following leasing models:

- Simplified Lease Acquisition Model
- Streamlined Lease Model
- Succeeding Lease, Superseding Lease Model
- Standard Lease Model
- On-Airport Lease Model

These checklists provides a reference point for all tasks/documentation necessary to complete a lease acquisition and should be used in coordination with the Leasing Desk Guide, which explains the policy requirements for each task. **(Note: In the near future, the GSA PBS Office of Leasing will be incorporating live hyperlinks from the specific line items in following lease file checklist to the appropriate Leasing Desk Guide section providing policy guidance on that specific line item.)**



↳ a. Simplified Lease Acquisition Model

a. Simplified Lease Acquisition Model

Simplified Lease

Agency:	_____
Location:	_____
Square footage:	_____
Project number:	_____
OA number:	_____
Lease number:	_____
Contracting officer:	_____
Leasing Specialist/RGA:	_____
Project manager:	_____
NBC agent:	_____
Broker contract number:	_____
Task order number:	_____
Phone number:	_____
Type of lease action:	Simplified

I. REQUIREMENTS DEVELOPMENT	Required	Note	Document in File
A. SF-81 or Other Request for Space			
B. Requirements Development Documentation (TMP, Needs Interview Checklist, gPM Documentation,			
C. Agency Specific Requirements (ASR) and Design Schematic			
D. GSA Pricing of TI Costs to Confirm Within TI Allowance			
E. Vacant Federal Space Check			
F. Delineated Area			
G. Rural Development Act Compliance			
H. Justification of Delineated Area Outside CBA			
I. Notification to City Official			
J. Notification to Field Office re: Lease Expiration			
K. Notification to FPS to Request the FSL —FSL Determination and Security Requirements			
L. Initial Scoring Worksheets for Lease Term >5 Years			
M. Draft OA with Simplified Clauses			
N. SLAT Project Management & Acquisition Plan or File Documentation			
O. Project Milestone Schedule			
P. National Broker Contract Task Order Documentation			
Q. Other			

a. Simplified Lease Acquisition Model ↗

Simplified Lease

II. PRE-SOLICITATION PHASE		Required	Note	Document in File
A.	Task Order / Project Orientation Meeting Minutes			
B.	Procurement Summary/FedBizOpps Advertisement and Responses			
C.	Market Survey, Market Survey Report, and Agency Concurrence			
D.	Lack of Competition Memorandum for File			
E.	Historic Preservation Compliance Check			
F.	Flood Plain Check			
G.	NEPA Compliance			
H.	Other			
III. SOLICITATION PHASE		Required	Note	Document in File
A.	Draft RLP Package, including Lease, Special Requirements, and Security Standards			
B.	Technical Review of Draft RLP and Draft Lease			
C.	Agency Approval of Draft RLP and Draft Lease			
D.	RLP Package Distribution List			
E.	Final RLP Package with Attachments			
F.	Cover Letter and Procurement Summary Form			
G.	Transmittal of Final RLP Package to Agency, GSA Field Office and FPS			
H.	Amendments to RLP Package			
I.	Correspondence with Offerors Prior to Receipt of Proposals			
J.	Other			
IV. PRE-NEGOTIATION/EVALUATION OF OFFERS		Required	Note	Document in File
A.	Negotiation Objectives			
B.	Competitive Range Determination/ Notification			
C.	Seismic Review			
D.	Fire Protection & Life Safety Review of Prelease Submittals			
E.	Request for Contractor Support Services for Lease Acquisition (e.g. CQM, Furniture Vendors, Etc.)			
F.	Other			



↳ a. Simplified Lease Acquisition Model

Simplified Lease

Simplified Lease				Document in File
V. UNSUCCESSFUL OFFER(S)	Required	Note		
A. Initial Offer and Related Correspondence				
B. Abstract of Offers				
C. Scaling/Measurement of Offered Space Floor Plans				
D. Initial Offer Present Value Analysis (PVA) Evaluation				
E. Notice of Deficiencies/Discussions/Negotiations				
F. Revised Offer and Related Correspondence				
G. Request for Final Proposal Revision				
H. Final Offer and Related Correspondence				
I. Final Offer Present Value Analysis (PVA) Evaluation				
J. Pre-Award Notice and Rejection Letters				
K. Post-Award Notice and Rejection Letters				
L. Post-Award Debriefings/Protests and Resolution/Congressional Inquiries and Responses				
M. Other				
VI. SUCCESSFUL OFFER AND AWARD DETERMINATION	Required	Note		Document in File
A. Initial Offer and Related Correspondence				
B. Abstract of Offers				
C. Scaling/Measurement of Offered Space Floor Plans				
D. Initial Offer Present Value Analysis (PVA) Evaluation				
E. Notice of Deficiencies/Discussions/Negotiations				
F. Revised Offer and Related Correspondence				
G. Request for Final Proposal Revision				
H. Final Offer and Related Correspondence				
I. Final Offer Present Value Analysis (PVA) Evaluation				
J. Price Negotiation Memorandum				
K. Final Scoring Evaluation or Scoring Memorandum				
L. Seismic Certification				
M. Flood Plain Compliance				
N. Responsibility Check				
—Central Contractor Registration (CCR) Information via SAM				
—Excluded Parties List Service (EPLS) via SAM				
—Past Performance				
—Financial Responsibility				
O. Energy Star Compliance/ Cost Effective Energy Efficiency Upgrades				
P. Approved Small Business Subcontracting Plan				
Q. Offeror's Proof of Authority and Ownership				
R. Other				

a. Simplified Lease Acquisition Model ↗

Simplified Lease

VII. APPROVAL AND FUNDING DOCUMENTS				Required	Note	Document in File
A.	Agency Recommendation Letter (From GSA) and Revised OA Signed by Agency					
B.	Receipt of RWA and Required Certification for Turn-key TI Above Allowance					
C.	BA 53 Fund Certification					
D.	Legal Review and Comment					
E.	Other					
VII. LEASE				Required	Note	Document in File
A.	Executed Lease Transmittal Letter					
B.	Fully Executed Lease					
C.	Lease Amendment(s)					
D.	Delivery Confirmation of Lease to Lessor					
E.	Other					
VIII. POST AWARD NOTIFICATIONS				Required	Note	Document in File
A.	Post Award Synopsis					
B.	Copy of Correspondence Transmitting Lease to Field Office					
C.	Copy of Correspondence Transmitting Lease to Agency					
D.	Copy of Correspondence Transmitting Lease to FPS					
E.	Request to GSA PMC/Field Office for Utility Contract					
F.	Other					
IX. POST AWARD				Required	Note	Document in File
A.	Drawings/Layouts from Agency/Lessor (Design Intent Drawings (DIDs))					
B.	Fire/Safety Approval of Layout Drawings					
C.	Finish Selections to Lessor					
D.	TI Notice to Proceed Issued					
E.	Construction Inspection Reports/Meeting Minutes/Green Lease Submittals					
F.	Acceptance of Space					
	—Measurement of Space					
	—Certificate of Occupancy					
	—Condition Survey Report (Form 1204) Signed by GSA, Agency and Lessor					
	—Punch List and Resolution					
G.	Change Orders Related to Initial Occupancy					
H.	Request Periodic Services Schedule from Lessor, Provide to Lease Administration Manager					
I.	SBA Reporting Letter					
J.	COR Letter to Designated Agency Representative or Field Office					
K.	Notification to Lessor Identifying Designated COR					
L.	Final OA and Evidence of Transmittal to Agency					
M.	Other					



↳ a. Simplified Lease Acquisition Model

Simplified Lease

X.	ADMINISTRATION	Required	Note	Document in File
A.	Operating Cost Escalations			
B.	Tax Escalations/Appeals			
C.	Change of Ownership			
D.	Lease Digest (R620)			
E.	RWA's Properly Certified			
F.	Miscellaneous Correspondence			
G.	Appeals/Claims/Disputes			
	—Correspondence			
	—Contracting Officer Decision			
	—Resolution			
	—Unresolved Claim(s)			
	—Civilian Board of Contract Appeals or Claims Court Decision			
	—Payment			
H.	Task Order Close Out			
I.	CAD As-Builts to CIFM			
J.	Other			

b. Streamlined Lease Model

Streamlined Lease

Agency:	_____
Location:	_____
Square footage:	_____
Project number:	_____
OA number:	_____
Lease number:	_____
Contracting officer:	_____
Leasing Specialist/RGA:	_____
Project manager:	_____
NBC agent:	_____
Broker contract number:	_____
Task order number:	_____
Phone number:	_____
Type of lease action:	Streamlined

I.	REQUIREMENTS DEVELOPMENT	Required	Note	Document in File
A.	SF-81 or Other Request for Space			
B.	Requirements Development Documentation (TMP, Needs Interview Checklist, gPM Documentation, etc.)			
C.	Agency Special Requirements (Option 2) or Agency Specific Requirements (ASR) (Options 1 and 3)			
D.	Design Schematic (Option 1)			
E.	GSA Pricing of TI Costs to Confirm Within TI Allowance			
F.	Vacant Federal Space Check			
G.	Delineated Area			
H.	Rural Development Act Compliance			
I.	Justification of Delineated Area Outside CBA			
J.	Notification to City Official			
K.	Notification to Field Office re: Lease Expiration			
L.	Notice to FMSP re: Randolph Sheppard			
M.	Notification to FPS to Request the FSL Determination —FSL Determination and Security Requirements			
N.	Initial Scoring Worksheets or Scoring Memorandum			
O.	Draft OA with Streamlined Clauses			
P.	Combined Project Management & Acquisition Plan			
Q.	Project Milestone Schedule			
R.	National Broker Contract Task Order Documentation			
S.	Other			



b. Streamlined Lease Model

Streamlined Lease

II. PRE-SOLICITATION PHASE		Required	Note	Document in File
A.	Task Order / Project Orientation Meeting Minutes			
B.	Procurement Summary/FedBizOpps Advertisement and Responses			
C.	Market Survey, Market Survey Report, and Agency Concurrence			
D.	Justification for Other Than Full and Open Competition			
E.	Historic Preservation Compliance Check			
F.	Flood Plain Check			
G.	NEPA Compliance			
H.	Other			
III. SOLICITATION PHASE		Required	Note	Document in File
A.	Draft RLP Package, including Lease, Special Requirements, and Security Standards			
B.	Technical Review of draft RLP and Draft Lease			
C.	Agency Approval of Draft RLP and Draft Lease			
D.	RLP Package Distribution List			
E.	Final RLP Package with Attachments			
F.	Cover Letter and Procurement Summary Form			
G.	Transmittal of Final RLP Package to Agency, GSA Field Office and FPS			
H.	Amendments to RLP Package			
I.	Correspondence with Offerors Prior to Receipt of Proposals			
J.	Other			
IV. PRE-NEGOTIATION/EVALUATIONS OF OFFERS		Required	Note	Document in File
A.	Negotiation Objectives			
B.	Competitive Range Determination/ Notification			
C.	Seismic Review			
D.	Fire Protection & Life Safety Review of Prelease Submittals			
E.	Request for Contractor Support Services for Lease Acquisition (e.g. CQM, Furniture Vendors, Etc.)			
F.	Other			
V. UNSUCCESSFUL OFFER(S)		Required	Note	Document in File
A.	Initial Offer and Related Correspondence			
B.	Abstract of Offers			
C.	Scaling/Measurement of Offered Space Floor Plans			
D.	Initial Offer Present Value Analysis (PVA) Evaluation			
E.	Notice of Deficiencies/Discussions/Negotiations			
F.	Revised Offer and Related Correspondence			
G.	Pre-Award DID Submission(s) and Agency Approval (Option 3)			
H.	Fire/Safety Approval of Layout Drawings (Option 3)			
I.	Request for Final Proposal Revision			
J.	Final Offer and Related Correspondence			
K.	Final Offer Present Value Analysis (PVA) Evaluation			
L.	Pre-Award Notice and Rejection Letters			
M.	Post-Award Notice and Rejection Letters			
N.	Post-Award Debriefings/Protests and Resolution/Congressional Inquiries and Responses			
O.	Other			

b. Streamlined Lease Model ↗

Streamlined Lease

VI. SUCCESSFUL OFFER AND AWARD DETERMINATION				Document in File
		Required	Note	
A.	Initial Offer and Related Correspondence			
B.	Abstract of Offers			
C.	Scaling/Measurement of Offered Space Floor Plans			
D.	Initial Offer Present Value Analysis (PVA) Evaluation			
E.	Notice of Deficiencies/Discussions/Negotiations			
F.	Revised Offer and Related Correspondence			
G.	Pre-Award DID submission(s) and agency approval (Option 3)			
H.	Fire/Safety Approval of Layout Drawings (Options 3)			
I.	Request for Final Proposal Revision			
J.	Final Offer and Related Correspondence			
K.	Final Offer Present Value Analysis (PVA) Evaluation			
L.	Price Negotiation Memorandum			
M.	Final Scoring Evaluation			
N.	Seismic Certification			
O.	Flood Plain Compliance			
P.	Responsibility Check:			
	—Central Contractor Registration (CCR) Information via SAM			
	—Excluded Parties List Service (EPLS) via SAM			
	—Past Performance			
	—Financial Responsibility			
Q.	EEO Compliance Review			
R.	Energy Star Compliance/ Cost Effective Energy Efficiency Upgrades			
S.	Evidence of LEED CI Compliance			
T.	Approved Small Business Subcontracting Plan			
U.	Offeror's Proof of Authority and Ownership			
V.	Other			
VII. APPROVAL AND FUNDING DOCUMENTS				Document in File
(A)		Required	Note	
A.	Agency Recommendation Letter (From GSA) and Revised OA Signed by Agency			
B.	Receipt of RWA and Required Certification for Turn-key above allowance			
C.	BA 53 Fund Certification			
D.	Legal Review and Comment			
E.	Other			
VII. LEASE				Document in File
(B)		Required	Note	
A.	Pre-Award (unsigned) Lease Transmittal Letter			
B.	Executed Lease Transmittal Letter (Award)			
C.	Fully Executed Lease			
D.	Lease Amendment(s)			
E.	Delivery Confirmation of Lease to Lessor			
F.	Other			



b. Streamlined Lease Model

Streamlined Lease

VIII. POST AWARD NOTIFICATIONS		Required	Note	Document in File
A.	Post Award Synopsis			
B.	Posting of Redacted Justification for Other Than Full and Open Competition			
C.	Copy of Correspondence Transmitting Lease to Field Office			
D.	Copy of Correspondence Transmitting Lease to Agency			
E.	Copy of Correspondence Transmitting Lease to FPS			
F.	Request to GSA PMC/Field Office for Utility Contract			
G.	Randolph Sheppard Notification to FMSP			
H.	Other			
IX. PRE-OCCUPANCY		Required	Note	Document in File
A.	Design Intent Drawings (DIDs) from Lessor (Options 1 and 2)			
B.	Fire/Safety Approval of Layout Drawings (Options 1 and 2)			
C.	Construction Drawings from Lessor			
D.	Construction Drawing Review by Government			
E.	Finish Selections to Lessor			
F.	Lessor's TI Construction Bids on TICS Table (Option 2)			
G.	Government Review of TI Costs and/or IGE (Option 2)			
H.	TI PNM (Option 2)			
I.	Receipt of RWA and Required Certification (Option 2)			
J.	TI Notice to Proceed Issued (Option 2)			
K.	Lessor's BSAC bids on SecUP (FSL III or IV)			
L.	Government's review of BSAC pricing and/or IGE (FSL III or IV)			
M.	BSAC PNM			
N.	BSAC Notice to Proceed issued (FSL III or IV)			
O.	Construction Inspection Reports/Meeting Minutes/Green Lease Submittals			
P.	Acceptance of Space			
	—Measurement of Space			
	—Certificate of Occupancy			
	—Condition Survey Report (Form 1204) Signed by GSA, Agency and Lessor			
	—Punch List and Resolution			
Q.	Change Orders Related to Initial Occupancy			
R.	Request Periodic Services Schedule from Lessor, Provide to Lease Administration Manager			
S.	SBA Reporting Letter			
T.	COR Letter to Designated Agency Representative or Field Office			
U.	Notification to Lessor Identifying Designated COR			
V.	Final OA and Evidence of Transmittal to Agency			
W.	Other			

b. Streamlined Lease Model ↗

Streamlined Lease

X.	ADMINISTRATION	Required	Note	Document in File
A.	Operating Cost Escalations			
B.	Tax Escalations/Appeals			
C.	Change of Ownership			
D.	Lease Digest (R620)			
E.	RWA's Properly Certified			
F.	Miscellaneous Correspondence			
G.	Appeals/Claims/Disputes			
	—Correspondence			
	—Contracting Officer Decision			
	—Resolution			
	—Unresolved Claim(s)			
	—Civilian Board of Contract Appeals or Claims Court Decision			
	—Payment			
H.	Task Order Close Out			
I.	CAD As-Builts to CIFM			
J.	Other			



↳ c. Succeeding Lease, Superseding Lease Model

c. Succeeding Lease, Superseding Lease Model

Succeeding/Superseding Lease

Agency:	_____
Location:	_____
Square footage:	_____
Project number:	_____
OA number:	_____
Lease number:	_____
Contracting officer:	_____
Leasing Specialist/RGA:	_____
Project manager:	_____
NBC agent:	_____
Broker contract number:	_____
Task order number:	_____
Phone number:	_____
Type of lease action:	Succeeding-Superseding

I. REQUIREMENTS DEVELOPMENT	Required	Note	Document in File
A. SF-81 or Other Request for Space			
B. Requirements Development Documentation (TMP, Needs Interview Checklist, gPM Documentation, etc.)			
C. Agency Special Requirements or Agency Specific Requirements (ASR)			
D. Vacant Federal Space Check			
E. Delineated Area			
F. Rural Development Act Compliance			
G. Justification of Delineated Area Outside CBA			
H. Notification to City Official			
I. Notification to Field Office re: Lease Expiration			
J. Notice to FMSP re: Randolph Sheppard			
K. Notification to FPS to Request the FSL Determination —FSL Determination and Security Requirements			
L. Initial Scoring Worksheets or Scoring Memorandum			
M. Prospectus Submission/Approval (House and Senate Resolutions)			
N. Draft OA			
O. Succeeding/Superseding Lease Decision Tool: All worksheets			
P. Combined Project Management & Acquisition Plan			
Q. Project Milestone Schedule			
R. National Broker Contract Task Order Documentation			
S. Other			

c. Succeeding Lease, Superseding Lease Model ↗

Succeeding/Superseding Lease

II. PRE-SOLICITATION PHASE				Required	Note	Document in File
A.	Task Order / Project Orientation Meeting Minutes					
B.	Procurement Summary/FedBizOpps Advertisement and Responses					
C.	Market Survey Analysis and Negotiation Objectives					
D.	Justification for Other Than Full and Open Competition					
E.	Historic Preservation Compliance Check					
F.	Flood Plain Check					
G.	NEPA Compliance					
H.	Other					
III. SOLICITATION PHASE				Required	Note	Document in File
A.	Draft RLP Package, including Lease, Special Requirements, and Security Standards					
B.	Agency Approval of Draft RLP and Draft Lease					
C.	Final RLP Package with Attachments					
D.	Cover Letter and Procurement Summary Form					
E.	Transmittal of Final RLP Package to Agency, GSA Field Office and FPS					
F.	Amendments to RLP Package					
G.	Correspondence with Offerors Prior to Receipt of Proposals					
H.	Other					
IV. PRE-NEGOTIATION/EVALUATION OF OFFERS				Required	Note	Document in File
A.	Seismic Review					
B.	Fire Protection & Life Safety Review of Prelease Submittals					
C.	Request for Contractor Support Services for Lease Acquisition (e.g. CQM, Furniture Vendors, Etc.)					
D.	Other					
V. UNSUCCESSFUL OFFER(S)—N/A				Required	Note	Document in File



↳ c. Succeeding Lease, Superseding Lease Model

Succeeding/Superseding Lease

SUCCESSFUL OFFER AND AWARD				
VI.	DETERMINATION	Required	Note	Document in File
A.	Initial Offer and Related Correspondence			
B.	Abstract of Offers			
C.	Notice of Deficiencies/Discussions/Negotiations			
D.	Revised Offer and Related Correspondence			
E.	Request for Final Proposal Revision			
F.	Final Offer and Related Correspondence			
G.	Price Negotiation Memorandum			
H.	Final Scoring Evaluation			
I.	Seismic Certification			
J.	Flood Plain Compliance			
K.	Responsibility Check			
	—Central Contractor Registration (CCR) Information via SAM			
	—Excluded Parties List Service (EPLS) via SAM			
	—Past Performance			
	—Financial Responsibility			
L.	EEO Compliance Review			
M.	Energy Star Compliance/ Cost Effective Energy Efficiency Upgrades			
N.	Approved Small Business Subcontracting Plan			
O.	Offeror's Proof of Authority and Ownership			
P.	Other			
VII.				Document in File
(A)	APPROVAL AND FUNDING DOCUMENTS	Required	Note	Document in File
A.	Agency Recommendation Letter (From GSA) and Revised OA Signed by Agency			
B.	Receipt of RWA and Required Certification			
C.	BA 53 Fund Certification			
D.	Legal Review and Comment			
E.	Other			
VII.				Document in File
(B)	LEASE	Required	Note	Document in File
A.	Pre-Award (unsigned) Lease Transmittal Letter			
B.	Executed Lease Transmittal Letter (Award)			
C.	Fully Executed Lease			
D.	Lease Amendment(s)			
E.	Delivery Confirmation of Lease to Lessor			
F.	Other			

d. Standard Lease Model

Standard Lease

Agency:	_____
Location:	_____
Square footage:	_____
Project number:	_____
OA number:	_____
Lease number:	_____
Contracting officer:	_____
Leasing Specialist/RGA:	_____
Project manager:	_____
NBC agent:	_____
Broker contract number:	_____
Task order number:	_____
Phone number:	_____
Type of lease action:	Standard

I.	REQUIREMENTS DEVELOPMENT	Required	Note	Document in File
A.	SF-81 or Other Request for Space			
B.	Requirements Development Documentation (TMP, Needs Interview Checklist, gPM Documentation, etc.)			
C.	Agency Special Requirements or Agency Specific Requirements (ASR)			
D.	Vacant Federal Space Check			
E.	Delineated Area			
F.	Rural Development Act Compliance			
G.	Justification of Delineated Area Outside CBA			
H.	Notification to City Official			
I.	Notification to Field Office re: Lease Expiration			
J.	Notice to FMSP re: Randolph Sheppard			
K.	Notification to FPS to Request the FSL Determination —FSL Determination and Security Requirements			
L.	Initial Scoring Worksheets or Scoring Memorandum			
M.	Prospectus Submission/Approval (House and Senate Resolutions)			
N.	Draft OA			
O.	Combined Project Management & Acquisition Plan			
P.	Project Milestone Schedule			
Q.	National Broker Contract Task Order Documentation			
R.	Other			



↳ d. Standard Lease Model

Standard Lease

II. PRE-SOLICITATION PHASE		Required	Note	Document in File
A.	Task Order / Project Orientation Meeting Minutes			
B.	Procurement Summary/FedBizOpps Advertisement and Responses			
C.	Market Survey, Market Survey Report, and Agency Concurrence			
D.	Justification for Other Than Full and Open Competition			
E.	Historic Preservation Compliance Check			
F.	Flood Plain Check			
G.	NEPA Compliance			
H.	Source Selection: Plan (Signed) and Related Correspondence			
I.	Other			
III. SOLICITATION PHASE		Required	Note	Document in File
A.	Draft RLP Package, including Lease, Special Requirements, and Security Standards			
B.	Technical Review of Draft RLP and Draft Lease			
C.	Agency Approval of Draft RLP and Draft Lease			
D.	RLP Package Distribution List			
E.	Final RLP Package with Attachments			
F.	Cover Letter and Procurement Summary Form			
G.	Transmittal of Final RLP Package to Agency, GSA Field Office and FPS			
H.	Amendments to RLP Package			
I.	Davis Bacon Wage Rates (Updated at FPR)			
J.	Correspondence with Offerors Prior to Receipt of Proposals			
K.	Other			
IV. PRE-NEGOTIATION/EVALUATION OF OFFERS		Required	Note	Document in File
A.	Negotiation Objectives			
B.	Competitive Range Determination/ Notification			
C.	Seismic Review			
D.	Fire Protection & Life Safety Review of Prelease Submittals			
E.	Request for Contractor Support Services for Lease Acquisition (e.g. CQM, Furniture Vendors, Etc.)			
F.	Other			

d. Standard Lease Model

Standard Lease

V. UNSUCCESSFUL OFFER(S)		Required	Note	Document in File
A.	Initial Offer and Related Correspondence			
B.	Abstract of Offers			
C.	Scaling/Measurement of Offered Space Floor Plans			
D.	Initial Offer Present Value Analysis (PVA) Evaluation			
E.	Notice of Deficiencies/Discussions/Negotiations			
F.	Revised Offer and Related Correspondence			
G.	Request for Final Proposal Revision			
H.	Final Offer and Related Correspondence			
I.	Final Offer Present Value Analysis (PVA) Evaluation			
J.	Pre-Award Notice and Rejection Letters			
K.	Post-Award Notice and Rejection Letters			
L.	Post-Award Debriefings/Protests and Resolution/Congressional Inquiries and Responses			
M.	Other			
SUCCESSFUL OFFER AND AWARD				Document in File
VI. DETERMINATION		Required	Note	Document in File
A.	Initial Offer and Related Correspondence			
B.	Abstract of Offers			
C.	Scaling/Measurement of Offered Space Floor Plans			
D.	Initial Offer Present Value Analysis (PVA) Evaluation			
E.	Notice of Deficiencies/Discussions/Negotiations			
F.	Revised Offer and Related Correspondence			
G.	Request for Final Proposal Revision			
H.	Final Offer and Related Correspondence			
I.	Final Offer Present Value Analysis (PVA) Evaluation			
J.	Price Negotiation Memorandum			
K.	Source Selection: Initial and Final Evaluation Reports			
L.	Source Selection: Conflict of Interest and Non-Disclosure Documentation			
M.	Source Selection: Source Selection Authority Decision			
N.	Final Scoring Evaluation			
O.	Seismic Certification			
P.	Flood Plain Compliance			
Q.	Negotiations of Environmental Remediation			
R.	Responsibility Check			
	—Central Contractor Registration (CCR) Information via SAM			
	—Excluded Parties List Service (EPLS) via SAM			
	—Past Performance			
	—Financial Responsibility			
S.	EEO Compliance Review			
T.	Energy Star Compliance/ Cost Effective Energy Efficiency Upgrades			
U.	Evidence of LEED Compliance			
V.	Approved Small Business Subcontracting Plan			
W.	Offeror's Proof of Authority and Ownership			
X.	Other			

↳ d. Standard Lease Model

Standard Lease

VII. APPROVAL AND FUNDING DOCUMENTS				Document in File
		Required	Note	
A.	Agency Recommendation Letter (From GSA) and Revised OA Signed by Agency			
B.	Receipt of RWA and Required Certification			
C.	BA 53 Fund Certification			
D.	Legal Review and Comment			
E.	Other			
VII. LEASE				Document in File
		Required	Note	
A.	Pre-Award (unsigned) Lease Transmittal Letter			
B.	Executed Lease Transmittal Letter (Award)			
C.	Fully Executed Lease			
D.	Lease Amendment(s)			
E.	Delivery Confirmation of Lease to Lessor			
F.	Other			
VIII. POST AWARD NOTIFICATIONS				Document in File
		Required	Note	
A.	Post Award Synopsis			
B.	Posting of Redacted Justification for Other Than Full and Open Competition			
C.	Copy of Correspondence Transmitting Lease to Field Office			
D.	Copy of Correspondence Transmitting Lease to Agency			
E.	Copy of Correspondence Transmitting Lease to FPS			
F.	Request to GSA PMC/Field Office for Utility Contract			
G.	Randolph Sheppard Notification to FMSP			
H.	Other			

d. Standard Lease Model

Standard Lease

IX.	POST AWARD	Required	Note	Document in File
A.	Drawings/Layouts from Agency/Lessor (Design Intent Drawings (DIDs))			
B.	Fire/Safety Approval of Layout Drawings			
C.	Construction Drawings from Lessor			
D.	Construction Drawing Review by Government			
E.	Finish Selections to Lessor			
F.	Lessor's TI Construction Bids on TICS Table			
G.	Government Review of TI Costs and/or IGE			
H.	TI PNM			
I.	Receipt of RWA and Required Certification			
J.	TI Notice to Proceed Issued			
K.	Lessor's BSAC bids on SecUP (FSL III or IV)			
L.	Government's review of BSAC pricing and/or IGE (FSL III or IV)			
M.	BSAC PNM			
N.	BSAC Notice to Proceed issued (FSL III or IV)			
O.	Construction Inspection Reports/Meeting Minutes/Green Lease Submittals			
P.	Acceptance of Space			
	—Measurement of Space			
	—Certificate of Occupancy			
	—Condition Survey Report (Form 1204) Signed by GSA, Agency and Lessor			
	—Punch List and Resolution			
Q.	Change Orders Related to Initial Occupancy			
R.	Request Periodic Services Schedule from Lessor, Provide to Lease Administration Manager			
S.	Davis Bacon Interview Forms and Wage Payment			
T.	SBA Reporting Letter			
U.	COR Letter to Designated Agency Representative or Field Office			
V.	Notification to Lessor Identifying Designated COR			
W.	Final OA and Evidence of Transmittal to Agency			
X.	Other			
X.	ADMINISTRATION	Required	Note	Document in File
A.	Operating Cost Escalations			
B.	Tax Escalations/Appeals			
C.	Change of Ownership			
D.	Lease Digest (R620)			
E.	RWA's Properly Certified			
F.	Miscellaneous Correspondence			
G.	Appeals/Claims/Disputes			
	—Correspondence			
	—Contracting Officer Decision			
	—Resolution			
	—Unresolved Claim(s)			
	—Civilian Board of Contract Appeals or Claims Court Decision			
	—Payment			
H.	Task Order Close Out			
I.	CAD As-Builts to CIFM			
J.	Other			



e. On-Airport Lease Model

On-Airport Lease

Agency:	_____
Location:	_____
Square footage:	_____
Project number:	_____
OA number:	_____
Lease number:	_____
Contracting officer:	_____
Leasing Specialist/RGA:	_____
Project manager:	_____
NBC agent:	_____
Broker contract number:	_____
Task order number:	_____
Phone number:	_____
Type of lease action:	On-Airport

I. REQUIREMENTS DEVELOPMENT	Required	Note	Document in File
A. SF-81 or Other Request for Space			
B. Requirements Development Documentation (On Airport Requirements Questionnaire; gPM			
C. Agency Special Requirements or Agency Specific Requirements (ASR)			
D. Notification to Field Office re: Lease Expiration			
E. Notification to FPS for Additional Security Requirements			
F. Initial Scoring Worksheets/ Scoring Memorandum			
G. Draft OA			
H. Combined Project Management & Acquisition Plan			
I. Project Milestone Schedule			
J. Other			
II. PRE-SOLICITATION PHASE	Required	Note	Document in File
A. Procurement Summary/FedBizOpps Advertisement and Responses			
B. Justification for Other Than Full and Open			
C. Historic Preservation Compliance Check			
D. Flood Plain Check			
E. NEPA Compliance			
F. Other			
III. SOLICITATION PHASE—NOT APPLICABLE	Required	Note	Document in File
IV. PRE-NEGOTIATION/EVALUATION OF OFFERS	Required	Note	Document in File
A. Negotiation Objectives			
B. Seismic Review			
C. Request for Contractor Support Services for Lease Acquisition (e.g. CQM, Furniture Vendors, Etc.)			
D. Other			

On-Airport Lease

V. UNSUCCESSFUL OFFER(S)—NOT APPLICABLE				Required	Note	Document in File
SUCCESSFUL OFFER AND AWARD						
VI. DETERMINATION				Required	Note	Document in File
A.	Offer and Related Correspondence/Discussions/Negotiations					
B.	Scaling/Measurement of Offered Space Floor Plans					
C.	Price Negotiation Memorandum					
D.	Final Scoring Evaluation					
E.	Negotiations of Environmental Remediation					
F.	Responsibility Check					
	—Central Contractor Registration (CCR) Information via SAM					
	—Excluded Parties List Service (EPLS) via SAM					
	—Past Performance					
G.	EEO Compliance Review					
H.	Energy Star Compliance/ Cost Effective Energy Efficiency Upgrades					
I.	Approved Small Business Subcontracting Plan					
J.	Offeror's Proof of Authority and Ownership					
K.	Other					
VII. (A) APPROVAL AND FUNDING DOCUMENTS				Required	Note	Document in File
A.	Agency Recommendation Letter (From GSA) and Revised OA Signed by Agency					
B.	Receipt of RWA and Required Certification					
C.	BA 53 Fund Certification					
D.	Legal Review and Comment					
E.	Other					
VII. (B) LEASE				Required	Note	Document in File
A.	Pre-Award (unsigned) Lease Transmittal Letter					
B.	Executed Lease Transmittal Letter (Award)					
C.	Fully Executed Lease					
D.	Lease Amendment(s)					
E.	Delivery Confirmation of Lease to Lessor					
F.	Other					
VIII. POST AWARD NOTIFICATIONS				Required	Note	Document in File
A.	Post Award Synopsis					
B.	Posting of Redacted Justification for Other Than Full and Open Competition					
C.	Copy of Correspondence Transmitting Lease to Field Office					
D.	Copy of Correspondence Transmitting Lease to Agency					
E.	Copy of Correspondence Transmitting Lease to FPS					
F.	Request to GSA PMC/Field Office for Utility Contract					
G.	Randolph Sheppard Notification to FMSP					
H.	Other					



e. On-Airport Lease Model

On-Airport Lease

IX. POST AWARD		Required	Note	Document in File
A.	Drawings/Layouts from Agency/Lessor (Design Intent Drawings (DIDs))			
B.	Fire/Safety Approval of Layout Drawings			
C.	Finish Selections			
D.	Notification to Contract Specialist/1102 Procuring Space Build Out			
E.	Receipt of RWA and Required Certification			
F.	Construction Inspection Reports/Meeting Minutes/ Submittals			
G.	Acceptance of Space			
	—Measurement of Space			
	—Certificate of Occupancy			
	—Condition Survey Report (Form 1204) Signed by GSA, Agency and Lessor			
	—Punch List and Resolution			
H.	Change Orders Related to Initial Occupancy			
I.	SBA Reporting Letter			
J.	COR Letter to Designated Agency Representative or Field Office			
K.	Notification to Lessor Identifying Designated COR			
L.	Final OA and Evidence of Transmittal to Agency			
M.	Other			
X. ADMINISTRATION		Required	Note	Document in File
A.	Change of Ownership			
B.	Lease Digest (R620)			
C.	RWA's Properly Certified			
D.	Miscellaneous Correspondence			
E.	Appeals/Claims/Disputes			
	—Correspondence			
	—Contracting Officer Decision			
	—Resolution			
	—Unresolved Claim(s)			
	—Civilian Board of Contract Appeals or Claims Court Decision			
	—Payment			
F.	Other			