APPENDIX C:

Templates, Forms, and Other Guidance

1. Introduction C-1
2. Lease Acquisition Models C-1
   - Standard C-1
   - Simplified C-2
   - Streamlined C-2
   - Succeeding/Superseding C-3
   - On-Airport C-3
   - Warehouse C-3
   - Other Lease Action Types C-4
3. Other Lease Forms and Templates C-4
   - Requirements Development C-4
   - Acquisition Planning C-4
   - Market Survey C-4
   - Solicitation Process C-5
   - Negotiations/Award C-5
   - Design/TI C-5
   - Commencement/Closeout/Lease Administration C-5
4. Calculation Tools and Worksheets C-5
5. Key Executive Orders, Lease Acquisition Circulars, and Other Guidance C-6
6. Realty Services Letters C-6

1. Introduction

This appendix lists leasing-related templates, forms, sample documents, and other useful resources cited throughout the Leasing Desk Guide. To constrain the size and complexity of this appendix, the tables on the subsequent pages give active hyperlinks to the most current version of the listed documents, rather than incorporating their full content into this document. The links connect to PDF copies of the documents at GSA's public web site at www.gsa.gov. These documents are also available in their source file format for GSA staff at the National Office of Leasing shared Google site at https://sites.google.com/a/gsa.gov/office-of-leasing/ under the Lease Forms tab.

To search throughout this and other documents you are viewing in Adobe Reader or Adobe Acrobat: press CTRL + F to open a simple "Find" toolbar, or press CTRL + SHIFT + F to open the advanced search function.

2. Lease Acquisition Models

The following document lists are based on the "List of RLP Documents" paragraph in each model's Request for Lease Proposal, except for the on-airport model, which is based on the "Documents Incorporated in the Lease" paragraph in the on-airport lease.

These lists do not include documents that may be necessary for the lease but for which there are no standard forms or templates, such as agency requirements or unit price lists. In addition, the lists do not include documents that are used during the lease acquisition process but do not accompany the RLP or lease, such as space calculators or present value analysis tools, which are listed separately in Section 4 of this appendix.

Standard

Document	Revision date
Standard RLP (GSA Form R101C)	Sep 2014
Standard Lease (GSA Form L201C)	Sep 2014
Solicitation Provisions (GSA Form 3516)	June 2012
General Clauses (GSA Form 3517B)	Mar 2013
Proposal to Lease Space—Standard (GSA Form 1364C)*	Sep 2014
Lessor's Annual Cost Statement (GSA Form 1217)	Jul 1994
Pre-lease Fire Protection and Life Safety Evaluation for an Office Building (Part A or Part B) (GSA Form 12000)	May 2011
Seismic Offer Forms (LDG Appendix G Attachment 2)	Sep 2012

*Note: Although the names of the source files for GSA Form 1364, Proposal to Lease Space, include the label "_082214," the files are in fact those issued via LAC 2014-05, dated September 17, 2014, and have page footers that carry the revision date "REV 09/14."

Simplified

Document	Revision date
Simplified RLP (GSA Form R101A)	Sep 2014
Simplified Lease (GSA Form L201A)	Sep 2014
Solicitation Provisions—Simplified (GSA Form 3516A)	Sep 2012
Proposal to Lease Space—Simplified (GSA Form 1364A)*	Sep 2014
Simplified Lease Proposal Data (GSA Form 1364A-1)	Nov 2012
Pre-lease Fire Protection and Life Safety Evaluation for an Office Building (Part A or Part B) (GSA Form 12000)	May 2011
Seismic Offer Forms (LDG Appendix G Attachment 2)	Sep 2012

*Note: Although the names of the source files for GSA Form 1364, Proposal to Lease Space, include the label "_082214," the files are in fact those issued via LAC 2014-05, dated September 17, 2014, and have page footers that carry the revision date "REV 09/14."

Streamlined

Document	Revision date
Streamlined RLP (GSA Form R101B)	Sep 2014
Streamlined Lease (GSA Form L201B)	Sep 2014
Solicitation Provisions (GSA Form 3516)	Jun 2012
General Clauses (GSA Form 3517B)	Mar 2013
Streamlined Lease Proposal (GSA Form 1364B)*	Sep 2014
Lessor's Annual Cost Statement (GSA Form 1217)	Jul 1994
Pre-lease Fire Protection and Life Safety Evaluation for an Office Building (Part A or Part B) (GSA Form 12000)	May 2011
Seismic Offer Forms (LDG Appendix G Attachment 2)	Sep 2012

*Note: Although the names of the source files for GSA Form 1364, Proposal to Lease Space, include the label "_082214," the files are in fact those issued via LAC 2014-05, dated September 17, 2014, and have page footers that carry the revision date "REV 09/14."

Succeeding/Superseding

Document	Revision date
Succeeding/Superseding RLP (GSA Form R102)	Sep 2014
Succeeding/Superseding Lease (GSA Form L202)	Sep 2014
Solicitation Provisions (GSA Form 3516)	Jun 2012
General Clauses (GSA Form 3517B)	Mar 2013
Proposal to Lease Space (GSA Form 1364D)*	Sep 2014
Lessor's Annual Cost Statement (GSA Form 1217)	Jul 1994
Pre-lease Fire Protection and Life Safety Evaluation for an Office Building (Part A or Part B) (GSA Form 12000)	May 2011
Seismic Offer Forms (LDG Appendix G Attachment 2)	Sep 2012

*Note: Although the names of the source files for GSA Form 1364, Proposal to Lease Space, include the label "_082214," the files are in fact those issued via LAC 2014-05, dated September 17, 2014, and have page footers that carry the revision date "REV 09/14."

On-Airport

The on-airport model does not employ an RLP.

Document	Revision date
On-Airport Lease (GSA Form L201D)	Sep 2013
General Clauses (GSA Form 3517B)	Mar 2013

Warehouse

Document	Revision date
Warehouse RLP (GSA Form R101WH)	Sep 2014
Warehouse Lease (GSA Form L201WH)	Sep 2014
Solicitation Provisions (GSA Form 3516)	June 2012
General Clauses (GSA Form 3517B)	Mar 2013
Proposal to Lease Space—Warehouse (GSA Form 1364WH)*	Sep 2014
Lessor's Annual Cost Statement (GSA Form 1217)	July 1994
Prelease Fire Protection and Life Safety Evaluation for a Warehouse Building (GSA Form 12000-WH)	May 2014
Seismic Offer Forms (LDG Appendix G Attachment 2)	Sep 2012

*Note: Although the names of the source files for GSA Form 1364, Proposal to Lease Space, include the label "_082214," the files are in fact those issued via LAC 2014-05, dated September 17, 2014, and have page footers that carry the revision date "REV 09/14."

Other Lease Action Types

Document	Revision date
Lease for Real Property—Short Form (for parking) (GSA Form 3626)	Apr 2009

3. Other Lease Forms and Templates

The following are other relevant documents, listed in order of the sequence of the lease acquisition process.

Requirements Development

Document	Revision date
Request for Space (SF-81)	Feb 1989
Workplace Needs Assessment Interview Tool	Oct 2012
Basic Space Program template	Jun 2013
GSA National Business Space Assignment Policy	Feb 2013
Clarification/Correction #1 - National Business Space Assignment Policy	Jul 2013
Clarification/Correction #2 - National Business Space Assignment Policy	Jun 2014

Acquisition Planning

Document	Revision date
Combined Project Management and Acquisition Plan Template	Pending review and final approval
Lease Project Management and Acquisition Plan Template—SLAT	Aug 2013
Succeeding/Superseding Lease Decision Tool	Nov 2014
Sample Justification for Other Than Full and Open Competition (from Leasing Desk Guide, Chapter 5)	Dec 2014
Cost-Benefit Analysis Template (from Leasing Desk Guide, Chapter 5)	Dec 2014

Market Survey

Document	Revision date
Lease Market Survey for Existing Building	May 2011
Automatic Categorical Exclusion (AutoCATEX) form (NEPA Memo to File)	Jan 2012
Market Survey Analysis and Negotiations Objectives (Succeeding/Superseding Lease)	

Solicitation Process

Document	Revision date
Combined Template for FedBizOpps Advertisement and Procurement Summary	Nov 2014

Negotiations/Award

Document	Revision date
Market Survey Analysis and Negotiations Objectives (Succeeding/Superseding Lease)	Jul 2013
Price Negotiation Memorandum template (pre-award)	Dec 2014
Notice to Unsuccessful Offeror template	Dec 2014

Design/TI

Document	Revision date
Lease Amendment Form	Dec 2012

Commencement/Closeout/Lease Administration

Document	Revision date
Lease Action Summary (GSA Form 3628)	Jan 1997

4. Calculation Tools and Worksheets

Document	Revision date
Present Value Analysis (PVA) calculator	Nov 2013
Warehouse Cubic PVA calculator	Sep 2013
TI Cost Summary (TICS) Table	May 2013

5. Key Executive Orders, Lease Acquisition Circulars, and Other Guidance

Document	Revision date
EO 11988, Floodplain Management	May 1977
EO 11990, Protection Of Wetlands	May 1977
EO 12072, Federal Space Management	Aug 1978
EO 12979, Agency Procurement Protests	Oct 1995
EO 13006, Locating Federal Facilities on Historic Properties in Our Nation's Central Cities	May 1996
EO 13514, Federal Leadership in Environmental, Energy, and Economic Performance	Oct 2009
LAC 2012-01, Application of the HUBZone Price Preference to Leasing	Mar 2012
LAC 2014-01, Automated Advanced Acquisition Program (AAAP)	May 2014
LAC-2014-05, Procedures for Server Room Heating, Ventilation, and Air Conditioning (HVAC) Requirements in Leases	Sep 2014
LAC 2014-06, Lease Requirements for Protection of Environmental, Archaeological, and Historic Resources	Sep 2014

6. Realty Services Letters

The following Realty Services Letters (RSLs) are currently in effect. Some RSLs have been superseded in part by Lease Acquisition Circulars (LACs). In any instance of overlap or discrepancy between them, LACs are the final authoritative source of leasing policy and guidance. Over time the Office of Real Estate Acquisition will be issuing additional LACs to update and replace these current RSLs, which will then be cancelled.

These RSLs are available on PBS Insite, accessible through the PBS Portal at http://pbsportal.pbs.gsa.gov, by selecting Leasing > Leasing Desk Guide/Forms > Realty Services Letters. RSLs are also available on the public Leasing web site at http://www.gsa.gov/portal/content/163759.

Cancelled RSLs are not listed here. Their content has been either incorporated as current policy into the relevant portions of the Leasing Desk Guide or else superseded by other subsequently issued guidance.

Date Issued	RSL Number	Subject
09/28/2010	RSL-2010-02	Energy Star® Requirement for Lease Acquisition with attachments 1–3
07/30/2010	RSL-2010-01	Reissuance of Realty Service Letters
08/12/2009	RSL-2009-06	Acquisition Planning for Leases Revised
06/02/2009	RSL-2009-04	Process for Lease Actions Funded by the American Recovery and Reinvestment Act (ARRA)
04/29/2009	RSL-2009-02	Revising GSA Form 3626, U.S. Government Lease for Real Property

Date Issued	RSL Number	Subject
02/19/2009	RSL-2009-01	Posting of Justifications for Other than Full and Open Competitions on the Federal Business Opportunities ("FedBizOpps" Website
09/26/2008	RSL-2008-07	Special Aspects of Contracting for Succeeding Leases
08/22/2008	RSL-2008-06	Procedures for FEMA Emergency and Disaster Leases
08/22/2008	RSL-2008-05	Price Preference for Historic Properties in Lease Acquisitions
08/22/2008	RSL-2008-04	Revised Solicitation for Offers Template, Revised Form 1364, Security Unit Price List
08/20/2008	RSL-2008-03	Revised Policy on the Determination of Operating or Capital Lease Classification for Budget Scorekeeping Purposes
06/13/2008	RSL-2008-01	Fire and Casualty Damage Clause Modification
12/27/2007	RSL-2007-12	Green Lease Policies and Procedures for Lease Acquisition
10/30/2007	RSL-2007-11	Free Space in a Leased Location
10/23/2007	RSL-2007-10	Leasing Delegations Approval and Oversight
10/23/2007	RSL-2007-09	Tax Adjustment Clause Enforcement
03/30/2007	RSL-2007-06	Tenant Improvement Project Management Support
03/19/2007	RSL-2007-05	Tenant Improvement Costs/ Reimbursable Work Authorization Tracker and Agency Concurrence for RWA Expenditure
03/19/2007	RSL-2007-04	Price Reasonableness Determinations and Notices to Proceed for Tenant Improvements Supplemental Lease Agreement for Excess TI's
03/19/2007	RSL-2007-03	Tenant Improvements Schedule and Submittals Revisions in the Solicitation for Offers
01/29/2007	RSL-2007-01	Updated Lease Representations and Certifications
11/28/2006	RSL-2006-09	Lease SFO Revisions for National Broker Contract
10/30/2006	RSL-2006-07	Airport Leasing for the TSA
10/06/2006	RSL-2006-06	Central Contractor Registration and Electronic Funds for Lease Payments - Supplemental Guidance
05/31/2006	RSL-2006-03	Accessibility in New Construction Lease Space
05/10/2006	RSL-2006-02	Mandatory Use of eLease (amended)
11/29/2005	PQ-2005-11	Lease Security Standards
11/14/2005	PQ-2005-09	Revised General Clauses
07/29/2005	PQ-2005-07	Central Contractor Registration
06/28/2005	PQ-2005-06	Revised Lease File Checklist and Guidance
05/13/2005	PQ-2005-05	Lease SFO Revisions for National Broker Contract
05/04/2005	PQ-2005-04	Fire Protection, Life Safety and Environmental Procedures in Lease Acquisition
02/15/2005	PQ-2005-03	Annual Review of STAR User Access to Ensure Proper Segregation of Duties and Electronic Data Security
01/18/2005	PQ-2005-01	Obtaining and Disseminating Schedules of Lease Periodic Services Other than Daily, Weekly or Monthly
08/02/2004	PQ-2004-03	Initial Cataloging of Lease Files
08/13/2003	PE-2003-05	Davis-Bacon Act and the Acquisition of Leasehold Interests in Real Property Clarification and SFO Revision
07/01/2003	PE-2003-03	“Office Hoteling” Leasing

Date Issued	RSL Number	Subject
06/30/2003	PE-2003-02	Adjusting Discount Rates and Inflation Rates for Lease Offer Analysis
03/14/2003	PE-2003-01	Rural Development Act Compliance
03/28/2002	PE-2002-03	Relocation Assistance for Lease Construction
02/21/2002	PE-2002-02	Regional Real Estate Peer Review
12/21/2001	PX-2001-05	Lease File Secure Storage
09/21/2001	PX-2001-03	Guidance on Use of the SFO and Lease Forms
07/03/1996	PER-96-03	Appraisal Requirements for Lease Acquisition
12/20/1995	PER-95-06	Executive Order 12072/ Implementation of Urban Location Policy
08/18/1995	PER-95-03	Simplified Procedures for Acquisition of Leasehold Interests in Real Property
09/13/1994	PQRP-94-07	Davis-Bacon Act and the Acquisition of Leasehold Interests in Real Property
06/24/1993	PQRP-93-02	Document Requirements for Non-Recurring Lease Payments Pursuant to the Prompt Payment Act