APPENDIX A:
Glossary of Terminology

Lease Acquisition

The acquisition by lease of an interest in real property for use by the Government, whether the space already exists or must be constructed.

Agency Design Guide

See Customer Space Standard.

Alteration

Remodeling, improving, enlarging, reducing, or making other changes to a facility, exclusive of maintenance repairs. Alteration includes planning, engineering, architectural work, and other similar actions.

ANSI/BOMA Office Area (ABOA)

Standard for measuring space recognized by the Government and documented in the American National Standards Institute/Building Owners and Managers Association (ANSI/BOMA) international standard (Z65.1-1996) definition for Office Area also known as ABOA. It is the area where a tenant normally houses personnel and/or furniture, for which a measurement is to be computed. ABOA is computed by measuring the area enclosed by the finished surface of the room side of corridors (corridors in place as well as those required by local codes and ordinances to provide an acceptable level of safety and/or to provide access to essential building elements) and other permanent walls, the inside face of the dominant portion of building exterior walls, and the center of tenant separating partitions. Where alcoves, recessed entrances, or similar deviations from the corridor are present, ABOA square footage is computed as if the deviation were not present.

Architectural Barriers Act Accessibility Standards (ABAAS)

Public Buildings Service (PBS) accessibility standards under the Architectural Barriers Act (ABA) of 1968. The ABA requires that buildings and facilities designed, built, altered, or leased with Federal funds be accessible to persons with disabilities. The United States Access Board develops and maintains accessibility guidelines under the ABA that serve as the basis for the standards used to enforce the ABA. GSA is one of four Federal agencies responsible for the standards. ABAAS comprises ABA Chapters 1 and 2 and Chapters 3 through 10 of the Americans with Disabilities Act and Architectural Barriers Act Accessibility Guidelines published by the U.S. Access Board on July 23, 2004. A full copy of the guidelines is available at

http://www.access-board.gov/ada-aba/final.htm. ABAAS Section F202.6, Leases, outlines compliance requirements for leased facilities.

Assignable Purchase Options

A purchase option gives GSA the right to buy a property at some future date. An assignable purchase option allows GSA to transfer this right to a third party (such as a potential lessor). This right allows GSA to select the preferred site in advance, obtain an assignable purchase option on the site, and have all developers bid to construct on the same site. Unless specifically authorized, assignable purchase options must be at "no cost" or nominal consideration.

Automatic Fire Sprinkler System

An electronically supervised, integrated system of underground and overhead piping, designed in accordance with NFPA 13, Standard for the Installation of Sprinkler Systems. The system is usually activated by heat from a fire and discharges water over the fire area. The system includes an adequate water supply.

BA53

A PBS budget activity that provides funding for the acquisition of real property for use by Federal agencies by leasing property from the private sector. It also provides funds to pay the United States Postal Service (USPS) for space in USPS buildings occupied by Federal agencies for which the General Services Administration (GSA) is responsible for providing space.

BA 54

A PBS no-year budget activity used to fund basic repair and alteration (R&A) projects, under the prospectus threshold that are not a part of an appropriation line-item.

BA 61

A PBS budget activity that provides funds to operate all Government-owned facilities that are maintained and operated by the General Services Administration (GSA). BA 61 also provides funds for building services in Government-leased space when the terms of a lease do not require the lessor to furnish such services. BA61 also funds staff support (including salaries, travel, training, etc.), information technology, some studies, inspection, and overhead payments to other parts of GSA.

Best Value Tradeoff

A source selection method where award is based on the evaluation of price and other non-price factors to determine the best value to the Government. The tradeoff concept provides the opportunity for a cost/technical trade-off (CTTO) and does not require that an award be made to the offeror submitting the lowest price or to the highest technically rated offer, although the ultimate decision may be to select the lowest priced offer or the highest technically rated offer. The Source Selection Authority (SSA) has the authority to make the cost/technical tradeoffs in a manner consistent with the award methodology stated in an SFO. Compare Lowest Price Technically Acceptable (LPTA).

Broker

An individual who acts on behalf of another person as an agent to negotiate for the lease, purchase, or sale of office space, buildings, land, or any other real estate. Sellers and Lessors will often be represented by a broker, and the Government has retained brokers to represent it in some lease procurements. See National Broker Contract (NBC). Broker commissioners paid by the Seller/Lessor will be reflected on the GSA Form 1217 Lessor's Annual Cost Statement (see Section II Line 31 of form).

Rentable Area

Rentable area is the area for which a tenant is charged rent. It is determined by the building owner and may vary by city or by building within the same city. The rentable space may include a share of building support/common areas such as elevator lobbies, building corridors, and floor service areas. Floor service areas typically include restrooms, janitor rooms, telephone closets, electrical closets, and mechanical rooms. The rentable space does not include vertical building penetrations and their enclosing walls, such as stairs, elevator shafts, and vertical ducts.

Building Common Area

The areas of a building that provide services to building tenants but are not included in the occupied area of any specific tenant. These areas typically include, (but are not limited to), main and auxiliary lobbies, atrium spaces at the level of the finished floor, concierge stations and security desks, building lounges and vending areas, health and fitness centers, community locker and shower facilities, mail rooms, fire control rooms, fully enclosed courtyards outside the exterior walls, and building core and service areas such as fully enclosed mechanical and equipment rooms. Specifically excluded from building common area are floor common areas, parking space, portions of loading docks outside the building line, and major vertical penetrations.

Building Rentable Area

Equal to the total of all of the Floor Rentable Areas within a building.

Building Shell

See Shell.

Buildout

The construction of new or relet space in accordance with a tenant's specifications, including configuring, (space planning and design), and finishing, (construction).

Capital Lease

See Scoring.

Central Business Area (CBA)

The centralized community business area and adjacent areas of similar character, including other specific areas that may be recommended by local officials in accordance with Executive Order 12072. CBAs are designated by local government and not by Federal agencies. Also sometimes referred to as the central business district (CBD) or central enterprise area (CEA). Compare with rural area.

Certificate of Occupancy (C of O)

A certificate issued by a local government stating that a building and/or a tenant suite is in a condition suitable for occupancy, sometimes called an Occupancy Permit. A certificate of occupancy is essential and required for PBS acceptance of space, but it is not in itself sufficient

for that purpose. The certificate of occupancy verifies that the space meets local legal and code requirements, but it does not verify compliance with the lease. If the local jurisdiction does not issue a Certificate of Occupancy, then the Lessor must obtain the services of a licensed fire protection engineer to verify that the offered space meets all applicable local codes and ordinances to ensure that an acceptable level of safety is provided.

Comparables

Examples of executed leases demonstrating characteristic lease terms available in the market. Comparables are used for analyzing the relative value of a proposed lease by comparing its characteristics to those of executed leases for similar, competing space.

Central Contractor Registration System (CCR)

The primary registrant database for the Federal Government. CCR collects, validates, stores, and disseminates data in support of agency acquisition missions. According to the FAR Section 4.11, prospective vendors must be registered in CCR before the award of a contract, a basic agreement, a basic ordering agreement, or a blanket purchase agreement. To register in CCR, a firm must have a Data Universal Numbering System (DUNS) number. The DUNS number is assigned by Dun & Bradstreet, Inc. to identify unique business entities.

Common Area Factor

Also known as the R/U (Rentable/Usable) Ratio or Core Factor, it refers to the conversion factor determined by the building owner and applied by the owner to the ANSI/BOMA Office Area (ABOA) square footage to determine the rentable square feet (Rentable Space) for the offered space.

Competition in Contracting Act (CICA)

A Federal statute ((41 U.S.C. § 251 et seq.)) enacted to encourage competition in the award of all types of Government contracts. Its purpose is to increase the number of competitors and to increase savings through lower, more competitive pricing. It requires contracting officers to provide for full and open competition by using one or more competitive procedures identified in the Act. Deviations from full and open competition must be documented in writing and authorized by the appropriate government official. See Justification for Other Than Full and Open Competition.

Construction Drawings (CDs)

Drawings that provide the specifications, engineering calculations, and construction details necessary to construct the space; sometimes referred to as "working" or "sealed" drawings. They are also the basis for determining code compliance, obtaining building permits, evaluating contractual performance, and determining legal liability for occupants' safety and welfare. CDs reflect both the lease requirements and specifications in the design intent drawings (DIDs). They must also conform to accessibility and life safety standards in the lease.

Consolidation Lease

"Consolidation lease" refers to a consolidation of space requirements from different locations (i.e., Federal and/or leased locations) into a single lease space requirement.

Contracting Officer's Representative (COR)

A qualified individual appointed by the Lease Contracting Officer to assist in the technical monitoring or administration of a contract. A COR must be a Government employee and possess the necessary qualifications (training) and experience commensurate with the responsibilities delegated to him or her. A COR can be a GSA employee or someone selected and nominated by

the client agency and then formally appointed to the contract by the Lease Contracting Officer. Also known as a Contracting Officer's Technical Representative (COTR). Designations of CORs must be in writing and enumerate the specific authorities being delegated.

Contracting Officer's Technical Representative (COTR)

See Contracting Officer's Representative (COR).

Core Factor

Synonym for Common Area Factor (see Common Area Factor)

CoStar

CoStar Group, Inc., a private-sector provider of information, marketing, and analytic services to commercial real estate professionals. It maintains a comprehensive database of commercial real estate information, such as space available for lease, comparable sales information, tenant information, properties for sale, property information for clients' web sites, industry professional directory, analytic information, data integration, property advertising, and industry news.

Cost-Benefit Analysis

A comparative analysis of the anticipated cost deferential of remaining in place compared to moving to another space. The Cost-Benefit Analysis includes anticipated market rates, moving costs, as well as costs to reproduce or build out the space and infrastructure to meet the tenant agency's mission. This analysis which demonstrates whether the overall cost to the Government is greater or lesser than the cost of remaining at the current location, provides the foundation for an OFOC used to justify a succeeding lease. GSAM 570.402-6 provides a detailed description.

Cost Technical Trade-Off (CTTO)

See Best Value Trade-Off.

Customers

As used within PBS, customers are other Federal agencies.

Customer Workplace Standards

Customer agency guidelines, regulations, and policies that address the allocation or construction of the customer's physical work environment. It often includes space allocation standards, utilization rate guidelines, support space recommendations, and special build-out requirements that would be followed during construction. In some cases, it also includes performance standards that the workspace must meet.

Davis-Bacon Act of 1931

A Federal statute governing wages paid under Federal contracts. Under the provisions of the act, contractors or their subcontractors must pay on-site workers no less than the locally prevailing wages and fringe benefits paid on projects of a similar character. Lease contracting officers are to include the *Labor Standards* paragraph in lease solicitations when the delivery schedules are long enough to permit satisfaction of the requirements through construction of a building. If an offeror proposes to satisfy the requirements through new construction or the complete rehabilitation or reconstruction of an existing building, and where the Government is the sole or predominant tenant of the facility, various FAR clauses implementing the Davis-Bacon Act will apply to the base build out and tenant improvement work. Davis-Bacon provisions are incorporated into all leases involving new construction.

Delineated Area

The specific boundaries within which space will be obtained to satisfy an agency space requirement. The delineated area for each lease procurement is defined by specific geographic boundaries.

Design Intent Drawings (DIDs)

Fully dimensioned drawings of leased space that consist of enough information to prepare construction drawings for the space including: (1) furniture, wall, door, and built-in millwork locations; telephone, electrical, and data outlet types and locations; and repositioned sprinklers, ceilings, and lighting, where affected; (2) specifications necessary for calculation of electrical and HVAC loads; and (3) all finish and signage selections. DIDs do not contain mechanical, electrical, or plumbing specifications or drawings. They do not carry furniture or computer and telecommunication specifications; nor do they contain signage, artwork, keying, or hardware schedules.

Effective Date (Lease)

The effective date of the lease is the date when the terms and conditions of the lease contract become binding on the lessor and the Government. For some purposes, different GSA practices over the years have also included it to mean the day the Government begins paying rent or the start date for tenant agency occupancy. Leasing specialists must be cognizant and careful of the different applications of the term.

Energy Star®

A joint program of the U.S. Environmental Protection Agency and the U.S. Department of Energy introduced in 1992 to promote energy efficiency. It administers a voluntary labeling program designed to identify and promote energy-efficient products to reduce greenhouse gas emissions. The Energy Star® label appears on more than 60 product categories, including major appliances, office equipment, lighting, home electronics, new homes, and commercial and industrial buildings. See also Leadership in Energy and Environmental Design (LEED®) and Chapter 18, Sustainability.

eLease

GSA's electronic tool that standardizes a national leasing transaction lifecycle and automates the daily tasks of realty professionals through document management and storage, electronic templates, a workflow engine, communication facilitation, and systems integration.

Equivalent Level of Safety

An alternative design or system (which may include automatic fire sprinkler systems), based upon fire protection engineering analysis, that achieves a level of safety equal to or greater than that provided by automatic fire sprinkler systems. (See 41 CFR 102-80 for guidance on conducting an analysis of equivalent level of safety.)

Escalation

An increase in rent during the lease term specified in the Lease contract. The escalation may be a periodic fixed increase, tied to a Government cost of living index, or calculated as an adjustment based on changes in expenses paid by the landlord (tax increases, increased maintenance costs, etc.).

Excluded Party Listing System (EPLS)

A primary source for ascertaining whether an offeror has been disqualified or excluded from participation in Federal contracts. Formerly known as the "debarred bidders list." It was

established to verify that agencies do business only with responsible contractors and do not allow a party to participate if any executive department or agency has debarred, suspended, or otherwise excluded them. The EPLS is accessible online at https://www.epls.gov/.

Executive Orders

Official documents, numbered consecutively, through which the President of the United States manages the operations of the executive branch of the Government.

Extension (Lease)

Extension of the expiration date of a lease to provide for continued occupancy on a short-term basis, with substantially the same terms and conditions. An extension is generally executed when there are evolving agency requirements, delays in delivery of a New or Replacing lease, or delays in a move to other federally controlled space. See GSAM 570.405, Lease Extensions.

Federal Acquisition Regulation (FAR)

Codification of uniform policies for acquisition of supplies and services by executive agencies. The official FAR appears in the Code of Federal Regulations at 48 CFR Chapter 1. It is issued and maintained jointly under the statutory authorities granted to the Secretary of Defense, Administrator of General Services, and the Administrator of the National Aeronautics and Space Administration. Statutory authorities to issue and revise the FAR have been delegated to the Procurement Executives in DOD, GSA, and NASA. The GSA FAR Secretariat publishes the FAR on behalf of all three FAR issuing agencies.

FedBizOpps or Federal Business Opportunities (FBO)

Web-based portal (https://www.fbo.gov/) that allows vendors to review Federal procurement opportunities over $25,000. It is designed as a single point of entry for Federal buyers to publish and for vendors to find posted Federal business opportunities across departments and agencies. Operation and maintenance of the FBO system and website is managed by the GSA Office of Acquisition Systems (OAS). As outlined under GSAM 505.101 (c). FBO is used to publicize potential leasehold procurements in lieu of, or in conjunction with, newspaper advertisements.

Federal Information Systems Management Act (FISMA)

Federal statute enacted as part of the E-Government Act of 2002 (Pub. L. No. 107-347). The goals of FISMA include developing a comprehensive framework to protect the Government's information, operations, and assets. It assigns specific responsibilities to Federal agencies, the National Institute of Standards and Technology (NIST), and the Office of Management and Budget (OMB) in order to strengthen IT system security. In particular, FISMA requires the head of each agency to implement policies and procedures to cost-effectively reduce information security risks to an acceptable level.

Federal Government

The Government of the United States of America.

Federal Management Regulation (FMR)

Subchapter C, (Parts 102-71 to 102-84) contains the scope and philosophy of GSA's real property policies as they apply to Federal agencies (including PBS) operating under, or subject to, the authorities of the Administrator of General Services. These policies cover the acquisition, management, utilization, and disposal of real property by Federal agencies that initiate and have decision-making authority over actions for real property services. This Desk Guide is the procedural guide for operating within the structures of the FMR.

Final Proposal Revision (FPR)

Last opportunity for offerors to revise their proposals before award. Previously known as "best and final offer." At the conclusion of discussions, each offeror still in the competitive range is given an opportunity to submit a final proposal revision. The Lease Contracting Officer is required to establish a common cut-off date only for receipt of final proposal revisions not necessarily for each round of negotiations. Requests for final proposal revisions should advise offerors that the final proposal revisions must be in writing and that the Government intends to make award without obtaining further revisions. After an offeror submits its final proposal revision, no further negotiations are allowed—only clarifications to achieve an accurate understanding are permitted.

Firm Term of Lease

The non-cancelable duration of the lease during which the Government has contractually committed to make rental payments with or without occupancy.

Fiscal Year

For the Federal Government, the fiscal year begins on October 1 of each calendar year and ends 12 months later on the following September 30, i.e., Fiscal Year 2011 begins October 1, 2010 and ends September 30, 2011.

Floor Common Area

Refers to the area on a floor such as washrooms, janitorial closets, electrical rooms, telephone rooms, mechanical rooms, elevator lobbies, and public corridors that are available primarily for the use of tenants on that floor.

Floor Common Area Factor

Refers to the conversion factor, that when applied to ANSI/BOMA Office (or store) Area or Building Common Area, gives the Basic Rentable Area of the office, store or building common area.

Floor Rentable Area

Refers to the result of subtracting from the gross measured area of a floor the major vertical penetrations on that same floor. It is usually permanently fixed, and rarely changes as a result of changes in corridor size or configuration.

Freedom of Information Act (FOIA)

The 1966 Freedom of Information Act (FOIA), 5 U.S.C. 552, as amended, permits any person to request access to Federal agency records or information. Federal agencies are required to disclose records upon receipt of a written request, except for records that are protected from disclosure by certain exemptions or exclusions in the act. Certain records are not releasable under a FOIA request if one or more of the following exemptions apply:

- Classified defense and foreign policy information
- Internal agency rules and practices

- Information prohibited from disclosure under other laws
- Trade secrets and confidential business practices
- Inter or intra-agency communications protected under law
- Information involving matters of personal privacy
- Certain information regarding law enforcement
- Information on supervision of financial institutions
- Geological information on wells

General Clauses

The provisions and clauses required for acquisition of leasehold interests in real property set out in GSAM Section 570.6. These clauses are included as an attachment to the Solicitation for Offers for leased space and may be updated from time to time. The general clauses are included in the various versions of the GSA Form 3517, General Clauses, Acquisition of Leasehold Interests in Real Property.

General Services Administration Acquisition Manual (GSAM)

Manual containing agency acquisition regulation (GSAR is shaded), policy (GSAM is not shaded), practices, clauses, provisions, and forms governing the leasing process (GSAR 570).

Gross Building Area

Refers to the total constructed area of a building and is generally not used for leasing purposes.

GSA

Refers to the U.S. General Services Administration, an executive agency of the Federal Government that is tasked with handling the acquisition of products and services for the government of the United States of America.

Guiding Principles For Federal Leadership in High Performance And Sustainable Buildings

A common set of principles http://www.fedcenter.gov/_kd/Items/actions.cfm?action=Show&item_id=4713&destination=ShowItem that 19 federal agencies (including GSA) established and agreed to follow for integrated design, energy performance, water conservation, indoor environmental quality, and materials designed to help Federal agencies and organizations:

- -Reduce the total ownership cost of facilities;
- -Improve energy efficiency and water conservation;
- -Provide safe, healthy, and productive built environments; and,
- -Promote sustainable environmental stewardship.

Hard Copy

A physical copy of a document from its source on the original paper, rather than an electronic copy such as facsimile or e-mail.

Hazardous Areas

Those areas in a building referred to as hazardous areas in NFPA 101, Life Safety Code, or any successor standard. Examples include areas used for the storage of combustibles or flammables; toxic, noxious, or corrosive materials; and heat producing appliances.

High-Rise Building

A building greater than 75 feet in height where the building height is measured from the lowest level of fire department vehicle access to the floor of the highest occupied floor (IBC 2009 or NFPA 101 2009). A building that is 6 stories or more in height is typically considered a high-rise building.

Historic District

A geographically definable area, urban or rural, possessing a significant concentration, linkage, or continuity of sites, buildings, structures, or objects united by past events or aesthetically by plan or physical development. A district may also comprise individual elements separated geographically but linked by association or history (36 CFR 60.3(d)). The historic district must be included in or be determined eligible for inclusion in the National Register of Historic Places.

Historic Property

Any prehistoric or historic district, site, building, structure, or object included in or determined eligible for inclusion in the National Register of Historic Places maintained by the Secretary of the Interior (36 CFR 800.16(l)).

Holdover

Retaining possession of leased space after the lease expiration or termination date.

Hoteling

The temporary leasing of a small block or blocks of space in a shared office arrangement, typically for use by an agency as swing space or for emergencies or special projects. A hoteling lease contains all the basic, generic features of a typical fully serviced office lease with standard Operational Services and it typically includes expanded services and amenities such as the use of office furniture, phone instruments, phone service, computers, Internet access, conference rooms, break rooms and security.

Independent Government Estimate (IGE)

An internal PBS document estimating an appraisal and pricing of a lease or other contract for goods or services. It is typically used as a reference point for comparison when examining tenant build-out costs.

ISC

The Interagency Security Committee was created by Executive Order 12977 in October 1995. It is chaired by the Department of Homeland Security and comprises 14 agencies with primary security responsibilities for non-military matters: (a) establish policies for security in and protection of federal facilities; (b) develop and evaluate security standards for federal facilities, develop a strategy for ensuring compliance with such standards, and oversee the implementation of appropriate security measures in federal facilities, and (c) take such actions as may be necessary to enhance the quality and effectiveness of security and protection of federal facilities.

Justification

See Justification for Other Than Full and Open Competition.

Justification for Other than Full and Open Competition (Justification or OTFO)

Document that justifies proceeding with a lease action without providing full and open competition, such as a sole source contract, or a contract resulting from an unsolicited proposal.

Landlord

See Lessor.

Lease, Leasehold Interest in Real Property

A contract by which a rightful possessor of real property conveys the right to use and occupy that property in exchange for consideration or rent. It may include operational services provided by the lessor.

Lease Award Date

The date the Lease Contracting Officer executes (signs) the lease that has already been signed by the lessor.

Lease Construction

Government planned/Government required new construction of a building resulting from a lease solicitation. Lease construction occurs when the Government requires a new construction solution to satisfy an agency's space requirements. Lease construction can also occur as a result of a solicitation for leased space that does not specify construction.

Lease Contracting Officer (LCO)

An individual holding a valid Government-issued warrant providing authority to enter into and administer leases on the Government's behalf. The Lease Contracting Officer's job classification is GS-1170, Realty Specialist.

Lease Cost Relative to Market (LCRM)

A measure that compares the PBS cost of leased space with comparable private commercial asking rates to determine whether PBS negotiates competitive rates for its leases.

Leasing Specialist (LS)

PBS personnel (classified GS-1170, Realty Specialist) who assist Lease Contracting Officers and may perform all duties that do not legally obligate the Government.

Leadership in Energy and Environmental Design (LEED®)

A green building certification system, developed by the private-sector, non-profit entity known as the U.S. Green Building Council, to provide third-party verification that a building or community uses strategies to improve performance across metrics such as energy savings, water efficiency, CO_2 emissions reduction, improved indoor environmental quality, and stewardship of resources. LEED® helps building owners and operators identify solutions for green building design, construction, operations, and maintenance. The system can be applied to both commercial and residential buildings and throughout the building lifecycle (design and construction, operations and maintenance, tenant buildout, and retrofit alterations). See also Energy Star®.

Lessee

The entity that enters into a contract with the Lessor. In all PBS leases, the United States acting by and through the U.S. General Services Administration (GSA) is the lessee. The tenant is the occupant agency or other entity so designated by the lessee. See Tenant.

Lessor

Any individual, firm, partnership, limited liability company, trust, association, state or local government, or legal entity that is the rightful owner of the property leased to the Federal Government. Synonym for landlord.

Lowest Price Technically Acceptable (LPTA)

Source selection approach in which award is made to the offeror presenting the lowest priced offer that is technically acceptable (meets the Government's minimum requirements). Compare to best value tradeoff.

Low-Rise Building

A building equal to or less than 75 feet in height where the building height is measured from the lowest level of fire department vehicle access to the floor of the highest occupied floor (IBC 2009 or NFPA 101 2009). A building that is 5 stories or less in height is typically considered a low-rise building.

Major Vertical Penetrations

Refers to stairs, elevator shafts, flues, pipe shafts, vertical ducts, and similar building penetrations, and their enclosing walls. Atria, light wells, and similar penetrations above the finished floor are included. Excluded are vertical penetrations for the private use of a tenant occupying office areas on more than one floor; as well as structural columns, openings for vertical electric cable or telephone distribution, and openings for plumbing lines. Vertical penetrations are not considered part of a building's rentable area.

Market Research

Any methodical effort to gather information about the market or customers, in order to gain insight or improve business decisions. It may involve consulting commercial databases, real estate brokers, and other sources of expertise. It may or may not involve directly contacting commercial lessors. Market research generates useful information for setting negotiation objectives by helping to identify ranges of fair and reasonable costs for the type of space desired.

Market Survey

A mechanism for gathering information about and visiting specific properties in the market to determine whether suitable property is competitively available and how to satisfy a lease requirement in the most competitive manner. Market surveys must not be used to target a single specific property to lease. The characteristics of each building inspected for a market survey must be documented.

Memorandum of Agreement (MOA)

A document that records an understanding of parties to cooperatively work together on an agreed upon project or meet an agreed objective. It outlines the terms of the parties to work in partnership and lists their agreed responsibilities. It is not intended to be a legally enforceable contract. See Memorandum of Understanding (MOA). MOA and MOU are interchangeable terms.

Memorandum of Understanding (MOU)

A document confirming agreed-upon terms, indicating an intended common line of action, and setting forth the basic principles and guidelines under which the parties will work together to accomplish their goals. . It is not intended to be a legally enforceable contract. See Memorandum of Agreement (MOA). MOA and MOU are interchangeable terms.

Milestones

PBS has established 15 standard customer milestones for tracking project delivery along all business lines. These milestones track the project throughout its major stages, including developing requirements through acquisition planning, issuing the SFO, awarding the lease contract, completing design and construction, and starting rent and occupancy. These 15 milestones can be accessed at http://pbsportal.pbs.gsa.gov:7777/portal/page?_pageid=80,582112&_dad=portal&_schema=PORTAL. To track leasing progress, PBS has mapped these 15 standard milestones to 24 specific leasing task project milestones. These project milestones provide greater detail on actual dates for sub-tasks within the various project phases. The 9 additional leasing-specific milestones concern customer project status reporting for most types of PBS projects, including new and existing space.

National Broker Contracts (NBCs)

Contracts for commercial real estate lease acquisition services that enable PBS to use private-sector brokers. Broker contracts require no appropriated funds, as no payments are made directly by the Government. Real estate brokers negotiate and collect commissions directly from building owners, as is typical in commercial real estate transactions. PBS leasing professionals serve as project managers and contracting officer's technical representatives, guiding the brokers to fulfill their responsibilities under the contracts. In June 2010 such contracts were awarded to CB Richard Ellis Global Corporate Services, Jones Lang LaSalle Americas Incorporated, Studley Incorporated, and UGL Equis Corporation.

National Register of Historic Places

A formally authorized list of districts, sites, buildings, structures, and objects that are judged significant in American history, architecture, archeology, engineering, and culture. The Secretary of the Interior is authorized to expand and maintain the National Register of Historic Places under the National Historic Preservation Act (36 CFR 60.1).

Net Annual Rent

Net annual rent is calculated by excluding only lessor-supplied services and utilities from the gross rent paid to the lessor.

Net Present Value

See Present Value Analysis (PVA).

New or Replacing Lease

A lease with new terms and conditions and a new lease contract number, applicable for either a new requirement or for the replacement of an existing expiring lease.

Non-Priced Evaluation Factor

An evaluation factor other than price, used by the Government to select awardees, normally in best value trade-off procurements, where award is based on the best value to the Government after considering price and technical (non-priced) evaluation factors. Also referred to as an award factor.

Notice to Proceed (NTP)

Notification to a contractor by the Lease Contracting Officer that the contractor can begin work subject to the conditions of the contract. The notice is given in writing and binds the Government contractually. The performance time of the contract starts from the NTP date. The notice to proceed for tenant improvements can be granted if competition for the construction contract

award is deemed adequate; the lessor's cost proposal is accepted (it is based on the lowest bid by a qualified contractor); final DIDs are approved, and all CDs are completed; and funds are available via a signed occupancy agreement, adequate BA 53 fund certification, and/or Reimbursable Work Authorization.

North American Industry Classification System (NAICS)

NAICS is the standard used by Federal statistical agencies in classifying business establishments for the purpose of collecting, analyzing, and publishing statistical data related to the U.S. business economy. The NAICS code for GSA leasing is 531190.

Occupancy Agreement (OA)

A complete, concise statement of a tenant agency's agreement to the financial terms and conditions for occupying PBS-controlled space. PBS prepares the OA, and both the tenant agency and GSA sign it. The document consists of the signed agreement and a financial summary.

Occupancy Services

Occupancy services are recurring services provided by GSA to a client agency during the client agency's occupancy of space. In leased locations the services include periodic inspections to ensure lessor compliance with the lease contract. These inspections are to identify that space is in a safe condition, and that cleaning and maintenance is routinely done by the lessor.

Offeror

A party making an offer in response to a Solicitation for Offers (SFO).

Office Area

Identical in meaning to ANSI/BOMA Office Area, (ANSI/BOMA Office Area is the preferred terminology).

Operating Costs

The portion of leasehold rent associated with the services, maintenance, utilities, and other operating expenses being provided by the lessor. This figure, also referred to in the SFO as the base rate, is used as the basis for calculating future CPI escalations. See Operational Services.

Operating Lease

See Scoring.

Operational Services

Services that support use of a leased property, such as heating, ventilation, air conditioning, utilities, custodial services, landscaping, pest control, and snow removal.

PBS

Refers to the Public Buildings Service, a branch of GSA (see GSA) that acquires, disposes of, and manages the Federal Government's real estate (buildings, land, real property interests including leases).

Present Value Analysis (PVA)

Analytical method for comparing rent streams among offers to determine the lowest offer. The present value amount provides a single cost representation of various rent streams, variations in operating costs, lump sum payments, and amortizations that allows the Government to

understand the true price of all offers in today's (present value) dollars. The PVA is calculated on a per square foot basis, using the ANSI/BOMA office area. The Leasing Specialist and broker contractor should always use the eLease PVA calculator to create a permanent record within eLease of the offers received in response to a solicitation.

Price Negotiation Memorandum (PNM)

A document describing the principal cost elements of a negotiated lease agreement, including documentation of fair and reasonable pricing. The Lease Contracting Officer must include the PNM in the contract file.

Price Negotiation Objectives

Objectives that establish the Government's initial and subsequent negotiation position. They assist in the Lease Contracting Officer's determination of fair and reasonable price.

Pro Forma

A financial estimate of the gross and net income and expenses expected in a new or renovated office building (or any real estate investment venture).

Program of Requirements (POR)

A document describing the client agency's needs, timeframes, and other special requirements for a specific project or location based on Customer Workplace Standards. It is developed through a comprehensive interaction between PBS and agency clients, using a variety of resources and templates that assist GSA associates with developing clear, comprehensive, and consistent client requirements.

Prospectus Threshold

40 U.S.C. 3307(a) establishes a limitation on the appropriation of funds to construct, alter, or acquire buildings, or to lease space or alter leased space, if the expenditure exceeds a threshold dollar amount, as adjusted annually in accordance with 40 U.S.C. 3307(h). Appropriations may be made only if the Committee on Environment and Public Works of the Senate and the Committee on Transportation and Infrastructure of the House of Representatives adopt resolutions approving the purpose for which the appropriation is made. The Administrator of General Services submits a prospectus for the proposed project to the committees to secure their approval though committee resolutions. The prospectus threshold for leases for fiscal year 2011 is $2.79 million annual rent, net of operating expenses.

Prospectus Lease

A prospectus lease proposes an annual net rent that exceeds the prospectus threshold amount for the fiscal year in which award is to be made, requiring the prior submission and approval of a prospectus.

Punch List

An itemized list of work to be completed or corrected by the lessor after substantial completion of the build out/alterations to the space.

Regional Account Manager (RAM)

Manager supported by a dedicated account team that works with a network of internal team members in various business lines to advocate clients' strategic business needs and objectives within PBS. This information and insight allows PBS to be a more customer-centric, strategic, and pro-active real estate organization, balancing our clients' business needs with our portfolio.

Reimbursable Work Authorization (RWA)

An RWA is a written agreement (documented on GSA Form 2957) between PBS and a customer agency, whereby PBS agrees to provide goods and services and the customer agency agrees to reimburse PBS' costs of these goods and services, indirect costs, and fees. RWAs certify a customer agency's funds availability and enable the agency to be billed for the cost of altering, renovating, repairing, or providing services in space managed by PBS over and above the basic operations financed through Rent, and in other properties managed by the Federal community. The RWA must include: A Bona Fide Need; a fully defined scope of work associated with the funds; a cost estimate that supports the total authorized amount of the RWA; plus financial and other supporting data (e.g., billing information) relative to the reimbursable service. The customer agency must also specify the type of funding available (i.e., annual or multi-year appropriations) as well as the expiration date of this obligational authority.

Renewal Option

The right, but not the obligation of the Government to continue a lease upon specified terms and conditions, including lease term and rent.

Rent and Related Services

The consideration paid for the use of leased property, plus the costs of operational services furnished by the lessor, the Government, or both.

Rentable Area

See Rentable Space.

Rentable Space

The area for which a tenant agency is charged rent. It is the ANSI/BOMA Office Area space measurement plus its associated share of floor common areas and building common areas. The rentable space may include a share of building support/common areas such as elevator lobbies, building corridors, and floor service areas. Floor service areas typically include restrooms, janitor rooms, telephone closets, electrical closets, and mechanical rooms. The rentable space does not include vertical building penetrations and their enclosing walls, such as stairs, elevator shafts, and vertical ducts. (Synonym to Rentable Area).

Rent Bill Management (RBM)

A program that requires customer billing data entered into PBS systems to be supported by source documentation and requires that PBS' billing policies are consistently applied. RBM is used to ensure that customer billing, lessor payments, and inventory data are:

- Verified against and supported by source documentation
- Nationally standardized and consistent with all PBS policies
- Reviewed and verified by a third party

Request for Lease Proposal

See Solicitation For Offers (SFO).

REXUS

The asset management database that will replace STAR as the PBS real estate inventory system. It will more tightly align the inventory with business processes, streamline the interactions between systems, and integrate with the PBS technical architecture.

R/U (Rentable/Usable) Ratio

Also known as the Common Area Factor (see Common Area Factor).

Rural Area

As defined in 7 U.S.C. 1991(a) (13) (A), "any area other than—

(a) A city or town that has a population of greater than 50,000 inhabitants; and

(b) The urbanized area contiguous and adjacent to such a city or town."

Scoring

Federal Government method for distinguishing between capital expenditures and operating expenditures for budget purposes. Capital expenditures are expenditures that are equivalent to the purchase of a capital asset, or fixed asset (such as a building). Operating expenditures represent costs that keep the Government operating (such as leases that do not result in the Government assuming the risks of ownership or that do not result in the Government ownership of the leased asset). Budgeting for capital leases and operating leases is accounted for differently; therefore, proper classification of leases is important to the Government's budgetary process (OMB Circular A-11 applies). The circular is available at the Office of Management and Budget (OMB) Website at www.whitehouse.gov. Each lease acquisition is reviewed by the Government during the lease acquisition process to verify that the lease is an operating lease and not scored as a capital lease. Depending upon project parameters, scoring may be performed at project initiation, and/or as part of evaluation of final offers.

Sensitive But Unclassified (SBU)

A category of building information determined to be protected from unauthorized access. PBS has determined that procedures to access, generate, disseminate, store, transfer, and dispose of SBU building information pertain to leased space in a facility that has been designated as one of the following:

(1) Interagency Security Committee (ISC) Facility Security Level IV GSA-leased facilities, or

(2) ISC Facility Security Level III GSA-leased facilities with 100 percent Government occupancy, or

(3) Building information for other GSA-leased facilities will be considered SBU when requested in writing by the funds certifying official of the customer agency

Shell (Building Shell)

The complete enveloping structure, the base-building systems, and the finished common areas (building common and floor common) of a building that bound the tenant areas. The completed building shell is the beginning point for tenant improvements. The lease Solicitation for Offers (SFO) contains a complete shell definition in its entirety.

Simplified Lease Acquisition

Procedures for awarding a lease at or below the Simplified Lease Acquisition Threshold. GSAM Subpart 570.2 prescribes the reduced procedures for awarding such leases.

Simplified Lease Acquisition Threshold (SLAT)

The lease value threshold below which PBS may employ Simplified Lease Acquisition Procedures; currently $150,000 average Net Annual Rent for the term of the lease, including option periods and excluding the cost of Operational Services.

Small Business Size Standard

Small Business Administration size standard of $20.5 million in gross annual receipts that applies to the owners of building space leased to the Federal Government. The small business size standard is set according to the procurement NAICS code, which for leasing is 531190.

Space Allocation Standards

See Customer Space Standards.

Sole Source Lease Acquisition

A lease that is entered into or proposed to be entered into after receiving authorization of a justification for other than full and open competition (OTFO) with only one source. An OTFO is not required if the requirement is made known to the public through a full and open ad, solicitations for offers are available to all interested sources, and all responsible sources are permitted to compete.

Solicitation for Offers (SFO)

A document used to solicit offers for a lease acquisition. The SFO describes Government requirements and performance criteria against which a lessor is expected to perform and the evaluation criteria that the Government will use to evaluate offers.

Source Selection

The processes and techniques for selecting a source or sources outlined in GSAM part 570. These include both the Lowest-Priced Technically Acceptable (LPTA) process and the Best Value Tradeoff process. The objective of source selection is to select the proposal that represents the best value to the Government.

Source Selection Authority (SSA)

The individual authorized to make the final decision to select the successful offeror (contract awardee), when using the Best Value Tradeoff process. While the source selection authority can be the Lease Contracting Officer, the SSA is usually an individual higher up in the procurement organizational structure for larger, complex procurements. The SSA has overall responsibility for seeing that the source selection process is conducted properly and efficiently and for making an impartial and sound selection decision.

Source Selection Evaluation Board (SSEB)

The team of Government employees (not contractors) appointed by the Source Selection Authority (SSA) to assist in a negotiated acquisition when using the Best Value Tradeoff process. The board typically consists of a chairperson, technical (non-voting) members and voting members, the Lease Contracting Officer, and a legal advisor. The client agency may be represented on the SSEB in either a voting or non-voting capacity.

Special Requirements

Requirements of the tenant agency that exceed improvements required for standard office space. Examples include security enhancements, LAN wiring specifications, increased HVAC requirements, and other similar requirements.

STAR (System for Tracking and Administering Real-property)

The asset management database that holds the PBS real estate inventory. It will be replaced by REXUS, which will more closely align the inventory with business processes, streamline the interactions between systems, and integrate with the PBS technical architecture.

Substantially Complete

The condition of space in which all work necessary for the Government's access, occupancy, use, and enjoyment has been completed, except for minor matters that don't interfere with access, occupancy, use, or enjoyment. If the space cannot be used for its intended purpose and cannot deliver its intended benefits, then it is not Substantially Complete and PBS may not accept the space.

Succeeding Lease

A non-competitive (Sole Source) lease acquisition secured to cover continued occupancy of the current premises at the end of a lease term without a break in tenancy. It establishes new terms and conditions and has a new lease contract number. A succeeding lease is generally used where acceptable new locations are not identified, or else are identified but a Cost-Benefit analysis indicates that an award to an offeror other than the current lessor will result in substantial relocation costs or duplication of costs to the Government, and the Government cannot expect to recover such costs through competition.

Superseding Lease

A new lease that replaces an existing lease prior to expiration. It is procured following non-competitive sole source procedures. It establishes new terms and conditions and has a new lease contract number. The Government considers executing a superseding lease to replace an existing lease when the Government needs numerous or detailed modifications to a space that would cause complications or substantially change the existing lease. A superseding lease should be considered where market rates have changed substantially.

Supplemental Lease Agreement (SLA)

Document used to change or modify an existing lease, such as for acquisition of additional space, partial release of space, revision in terms or rental payments, change in ownership or payee, or any other action that changes the lease. The SLA is documented on GSA Form 276, Supplemental Lease Agreement.

Swing Space

Temporary space for personnel who must be moved out of their leased space during renovation or alterations.

Tenant Agency

The entity that occupies leased space. See Lessee.

Tenant Improvement Solicitation for Offers (TI SFO)

The SFO used for other than Simplified and Accelerated PBS lease acquisitions. With this SFO each offeror agrees to provide a Tenant Improvement allowance established by PBS in lieu of describing the tenant improvements in detail. Once the actual tenant improvement price is negotiated after lease award, the rental rate is adjusted according to the terms and interest established under the lease.

Tenant Improvements (TIs)

The finishes and fixtures that transform space from its shell condition to a finished, usable condition. A tenant improvement allowance provided by the building owner is the funding source that enables the space to be fitted out for occupancy to meet a customer agency's specific requirements. The PBS tenant improvement definition is found in its entirety in the lease SFO.

Transaction Management Playbook (TMP)

In requirements development, a process for capturing the "five key interactions with clients," to ascertain that PBS thoroughly understands and meets their needs. The five key interactions with clients are: conduct a needs interview; confirm requirements; present options; document agreement; and deliver as promised.

Turnkey Projects

With the turnkey approach, the SFO defines all of the Government's requirements, including the tenant improvements, and all of the costs are negotiated before award. The turnkey approach is used in lieu of the standard TI SFO and is only possible when an agency provides a fully detailed Program of Requirements (POR). A POR results from the completion of a requirements development package. This package includes:

- An organizational study to identify mission, organizational size and structure, projected growth, work types and related space types, applicable space standards, and union requirements;
- A narrative with a general overview of the client's operations;
- A description of special site building or auxiliary facility requirements;
- Current and life-of-lease projected headcount data;
- Usable square footage requirements broken down by space types;
- Program data with a list of spaces for the building, a list of requirements for each space, a list of requirements for each auxiliary facility, diagrams of relationships among occupant groups(adjacency diagrams), diagrams or descriptions of features of key spaces, tabulations of requirements based upon the number of occupants, and tabulations of floor areas; and
- An overview of site and facility design requirements based on the above criteria, including flexibility of layout, potential for facility growth, and zoning of site and facility for public and secure areas.

Security design requirements, communication, and special space requirements must also be identified. A requirements development package may include requirements for thermal design, acoustical design, lighting, and HVAC. Concept floor plans with annotations of key issues and supplementary drawings of special features, layouts, equipment, furnishings, and details may also be included if necessary.

Walk-Through

Inspection of building space by the tenant and the landlord (or their representatives) together to evaluate the quality and completeness of remodeling or construction and to determine whether the space is Substantially Complete and ready for occupancy by the tenant. During the walk-through a Punch List is generated.

Unique Requirement

Requirement listed in the Unique Requirements paragraph of the Solicitation for Offers (SFO), describing features that a building or location must have to adequately accommodate the agency's requirements. Examples would be prescribing a certain floor location (e.g. above the first floor) or proximity to public transportation stops (e.g. within two blocks of XYZ metro line).