



DEC 04 2015

MEMORANDUM FOR: REGIONAL COMMISSIONERS, PBS
REGIONAL LEASING DIRECTORS
REGIONAL LEASING SERVICES OFFICERS

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

A handwritten signature in blue ink, appearing to read "J. Wisner", is written over the printed name and title.

SUBJECT: LEASING ALERT – New Project Management and Acquisition Plan Template and Revised Request for Lease Proposal (RLP) Paragraph

1. Purpose. This Leasing Alert issues a new project management and acquisition plan template and RLP language that incorporates Economic Catalyst policies, established by GSA Order ADM 1097.1. The project management and acquisition plan template also includes revisions to reflect the issuance of the Global and Small RLP and Lease templates, as well as updated procurement thresholds and minor formatting changes.

2. Definitions. The project management and acquisition plan template and RLP language include some new terminology concerning transportation infrastructure and urban location policy. To provide clarity, definitions for these new terms are shown below:

a. Fixed Guideway. A public transportation facility using and occupying a separate right-of-way or rail for the exclusive use of public transportation. Subway, light rail and bus rapid transit are all forms of Fixed Guideway transit.

b. Bus Rapid Transit (BRT). BRT operates similar to a rail system but without the tracks. Bus rapid transit systems feature separated right-of way or exclusive lanes, signal priority, off line fare collection, and express service between stops.

c. Light rail. Operates on existing streets and areas as well as on separated rights of way. It normally uses overhead wires to collect power and operates usually as a two-car train.

d. Commuter bus. Fixed-route bus systems that are primarily connecting outlying areas with a central city through bus service that operates with at least five

miles of continuous closed-door service. This service usually features limited stops in the central city.

e. Commuter rail. Operates as passenger trains over conventional railroad tracks. They can be electrically powered or operate in trains pulled by diesel locomotives. Typically used by commuters traveling from suburbs to central city service over regular railroad tracks.

f. Streetcar. This mode is for rail transit systems operating entire routes predominantly on streets in mixed-traffic. This service typically operates with single-car trains powered by overhead catenaries (i.e., overhead power lines) and with frequent stops.

3. Effective Date. This Leasing Alert is effective as of the date of issuance unless modified, canceled, or reissued.

4. Cancellation. None.

5. Applicability. This Leasing Alert is mandatory and applies to all General Services Administration (GSA) real property leasing activities and to activities delegated by GSA to other Federal agencies.

6. Instructions and Procedures. This LAC, instructions, and attachments are effective for all RLPs issued on or after the effective date of this LAC. RLP packages issued prior to this date may be modified at the discretion of the Lease Contracting Officer.

Attachment 1, Project Management and Acquisition Plan Template

Attachment 2, RLP Paragraph, entitled "NEIGHBORHOOD, PARKING, LOCATION AMENITIES, AND PUBLIC TRANSPORTATION (DEC 2015)"

COVER PAGE FOR ATTACHMENTS 1 THROUGH 2

PROJECT MANAGEMENT AND ACQUISITION PLAN (ACQUISITION OF LEASEHOLD INTERESTS IN REAL PROPERTY)

THIS TEMPLATE COMBINES THE PROJECT MANAGEMENT PLAN (REQUIRED UNDER CURRENT GPM INITIATIVES) WITH THE ACQUISITION PLAN, TO BE USED FOR LOW RISK PROJECTS WHEN THE LEASING SPECIALIST/LEASE CONTRACTING OFFICER ASSUMES THE ROLE OF PROJECT MANAGER. FOR MEDIUM TO HIGH RISK PROJECTS, A SEPARATE PROJECT MANAGEMENT PLAN MUST BE PREPARED.

BACKGROUND:

REALTY SERVICES LETTER (RSL) PQ-2005-02 "ACQUISITION PLANNING FOR LEASING" PROVIDED INSTRUCTIONS FOR ACQUISITION PLANNING SPECIFICALLY FOR LEASE PROCUREMENTS. EFFECTIVE MAY 18, 2009, THE GENERAL SERVICES ADMINISTRATION ACQUISITION MANUAL (GSAM) WAS CHANGED TO PROVIDE UPDATED GUIDANCE ON ACQUISITION PLANNING, TO IMPLEMENT NEW DOLLAR THRESHOLDS FOR ACQUISITION PLAN APPROVALS, AND TO ELIMINATE THE DISTINCTION BETWEEN LIMITED AND COMPREHENSIVE PLANS. RSL 2009-06 "ACQUISITION PLANNING FOR LEASES – REVISED" ISSUED ON AUGUST 8, 2009, REVISED INSTRUCTIONS FOR ACQUISITION PLANNING FOR LEASE PROCUREMENTS AND IMPLEMENTED THE NEW DOLLAR THRESHOLDS AND ASSOCIATED APPROVING OFFICIALS FOR ACQUISITION PLANS WITHIN PBS. THE RSL ALSO ELIMINATED THE DISTINCTION BETWEEN LIMITED AND COMPREHENSIVE ACQUISITION PLANS CONSISTENT WITH THE GSAM CHANGES. AS OF OCTOBER, 2010, THE ACQUISITION PLAN TEMPLATE HAS BEEN REVISED AND STREAMLINED EVEN FURTHER AND AS FOLLOWS:

- THE ACQUISITION PLAN IS NO LONGER A PROGRESSIVE DOCUMENT.
- MARKET SURVEY DOCUMENTS ARE NO LONGER REQUIRED TO BE ATTACHED.
- MARKET DATA REPLACES THE MARKET SURVEY.
- THE ACQUISITION PLAN IS ONLY REQUIRED TO BE UPDATED WHEN A MATERIAL CHANGE IS PROPOSED.

ALL LEASES, REGARDLESS OF DOLLAR VALUE, REQUIRE ACQUISITION PLANNING BEFORE BEGINNING THE PROCUREMENT. THIS TEMPLATE IS FOR LEASE ACTIONS ABOVE THE SIMPLIFIED LEASE ACQUISITION THRESHOLD (SLAT).

IF THERE IS A MATERIAL CHANGE TO THE ACQUISITION STRATEGY, SUCH AS A CHANGE IN THE PROCUREMENT METHOD, OR A SIGNIFICANT EXPANSION OR CONTRACTION OF THE DELINEATED AREA, YOU MUST PREPARE AND OBTAIN APPROVAL OF A MEMORANDUM OR SUPPLEMENT TO THE ORIGINAL ACQUISITION PLAN WHICH ADDRESSES THE CHANGE(S). IF THERE IS NOT A MATERIAL CHANGE, BUT A CHANGE THAT AFFECTS TOTAL CONTRACT VALUE, AND THEREFORE CHANGES THE APPROVAL LEVEL, THEN YOU MUST PREPARE AND OBTAIN APPROVAL OF A MEMORANDUM EXPLAINING THE CHANGE AND ATTACHING THE ORIGINALLY-APPROVED ACQUISITION PLAN WITH SIGNATURES. IF THERE IS NOT A MATERIAL CHANGE, AND THERE IS NO CHANGE TO THE APPROVAL LEVEL, THE LEASE CONTRACTING OFFICER (LCO) MUST DOCUMENT THE LEASE FILE WITH A MEMORANDUM AND ATTACH TO THE ORIGINAL ACQUISITION PLAN.

AS PART OF THE PLANNING PROCESS, THE PLANNING TEAM, AS DEFINED IN GSAM PART 507, MUST HOLD CUSTOMER DISCUSSIONS. DISCOVERY OF ANY UNIQUE CUSTOMER STATUTORY OR REGULATORY REQUIREMENT APPLICABLE TO, OR THAT MAY AFFECT THE ACQUISITION PROCESS, MUST BE DOCUMENTED IN THE ACQUISITION PLAN.

NOTE: ADDITIONAL REVIEW/CONCURRENCE THRESHOLDS:

- PER GSA ORDER ADM 5000.4B, LEGAL REVIEW OF ACQUISITION PLANS IS REQUIRED FOR ALL ACTIONS WHEN:
 - OVER SLAT, WHERE BEST VALUE TRADEOFF SOURCE SELECTION IS ANTICIPATED
 - OVER \$20 MILLION AGGREGATE VALUE

REGIONAL OFFICE OF SMALL BUSINESS UTILIZATION (SBU) CONCURRENCE OF ACQUISITION PLANS IS REQUIRED FOR ALL ACTIONS WITH AGGREGATE VALUE OF \$6.5 MILLION OR MORE.

PROJECT MANAGEMENT AND ACQUISITION PLAN
(ACQUISITION OF LEASEHOLD INTERESTS IN REAL PROPERTY)

PROJECT NO.: _____

A. PROJECT DEFINITION/STATEMENT OF NEED

1. Requiring Agency(ies): _____
2. Location of pending action: _____ (CITY AND STATE)
3. Project background/trigger event: _____ BRIEFLY SUMMARIZE EVENTS (LEASE EXPIRATION, NEED FOR EXPANSION, FEDERAL BUILDING SWING SPACE PROJECT, ETC) LEADING TO THIS LEASEHOLD ACTION.
4. Federal inventory check:
TO CHECK A BOX, DOUBLE-CLICK ON THE BOX, THEN CLICK ON "CHECKED" UNDER THE DEFAULT VALUE SECTION OF THE DIALOGUE BOX.
☐ No vacant federally-controlled space available
☐ Vacant federally-controlled space available, but not suitable due to: _____
5. REXUS action type:
☐ New
☐ New Replacing
☐ Succeeding
☐ Superseding
☐ Expansion
Within Scope: ☐ Yes. Describe: _____
☐ No. Will prepare an OTFO justification
☐ Extension (GSAM 570.405)
Select the purpose of the extension:
☐ Construction Delay
☐ Customer DID Prep. Delay
☐ Lack of Agency Funding
☐ Lack of Agency POR
☐ Lessor Delay
☐ Market Conditions
☐ Strategic Portfolio Scheduling
☐ Tactical Considerations
☐ Other (workload, agency leaving PBS inventory, forced move, FEMA emergency, etc)
Describe: _____
Describe follow-on action for long-term housing solution, if applicable. _____
☐ Renewal (GSAM 570.401)
☐ Evaluated ☐ Unevaluated
6. Estimated Square Footage to be acquired: _____ RSF; _____ ABOA

If Requirement Action Type is not a "New Requirement", provide the following:
 - a) Current lease number: _____
 - b) Building name and address: _____
 - c) Current square footage: _____ RSF; _____ ABOA
 - d) Current annual rent rate: \$ _____ /RSF
 - e) Lease expiration is: _____
 - f) If applicable, describe existing renewal option(s): _____
7. Anticipated Utilization Rate (UR)
 - a) All-In: _____ [CALCULATED AS TOTAL USF / PERSONNEL COUNT ASSIGNED TO AFFECTED SPACE]
 - b) Total Office: _____ [CALCULATED AS TOTAL OFFICE AREA (TTO) x 0.78] / PERSONNEL COUNT ASSIGNED TO AFFECTED SPACE]
 - c) Meets GSA or Client Agency UR benchmark:
☐ Yes

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☐ No Explain: _____

8. Anticipated RLP Template:

- ☐ Global
- ☐ Automated Advanced Acquisition Program (AAP)
- ☐ Simplified
- ☐ On-Airport
- ☐ Warehouse
- ☐ Small/3626
- ☐ N/A (Extensions/Expansions/Renewal Options)

9. Procurement Method:

- ☐ Full and Open Competition (GSAM 570.3)
Source Selection Procedures:
 - ☐ Lowest Price Technically Acceptable
 - ☐ Best Value (Tradeoff)
- ☐ Other Than Full and Open Competition
 - ☐ Cost-Based Rationale (Succeeding/Superseding)
 - ☐ Mission-Based Rationale for Limiting CompetitionDescribe the mission-based rationale: _____

10. Delineated Area considerations (not applicable for extensions or renewals)

THE FOLLOWING TWO SECTIONS OUTLINE THE STRATEGY FOR MEETING GSA'S RESPONSIBILITIES UNDER VARIOUS FEDERAL LOCATION POLICIES, INCLUDING THOSE FOUND IN EO 12072, EO 13693, AND GSA ADM 1097.1.

Section I: Economic Catalyst and Location Considerations – CURRENT LOCATION ONLY – If not applicable (new actions), check here ☐

a) Smart Location Index (SLI) Score: _____ (SLI SCORE CAN BE OBTAINED FROM [HTTPS://INSITE.GSA.GOV/PORTAL/CATEGORY/544526](https://insite.gsa.gov/portal/category/544526))

b) Existing types of transit infrastructure in the metropolitan region (check all that apply):

- ☐ Fixed-guideway transit (subway/light rail/bus rapid transit (BRT))
- ☐ Bus/streetcar
- ☐ Commuter rail
- ☐ None

Section II: Economic Catalyst Considerations – Location Strategy

a) Local and Regional Planning and Economic Development (GSA ADM 1097.1, Section 4(a))

i) Is there a Local Portfolio Plan (LPP): [\[CONSULT WITH REGIONAL PORTFOLIO MANAGEMENT OFFICE\]](#)

- ☐ No
- ☐ Yes
 - ☐ Delineated area and housing plan is consistent with LPP
 - ☐ Delineated area and housing plan is not consistent with LPP for the following reason(s): _____

ii) Communication with local officials:

- ☐ No
- ☐ Yes
 - ☐ Delineated area is consistent with local community and economic development planning
 - ☐ Delineated area is not consistent with local community and economic development planning for the following reason(s): _____

iii) Rural Development Act (RDA) Compliance:

- ☐ Agency will be located within a rural area as defined by the Rural Development Act of 1972, as amended.

[\[INDICATE WHETHER THE DELINEATED AREA INCLUDES A RURAL TOWN CENTER\]](#)

- ☐ Delineated area includes a rural town center as identified by local officials

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- ☐ Delineated area does not include a rural town center
☐ Agency will not be located within a rural area [REQUIRES WRITTEN STATEMENT FROM THE AGENCY AFFIRMING THAT FIRST PRIORITY HAS BEEN GIVEN TO RURAL AREAS AND THAT AN URBAN LOCATION IS REQUIRED.]

iv) Executive Order 12072 Compliance (if not applicable, check here ☐): [APPLIES ONLY TO URBAN AREAS; NOT APPLICABLE IF LOCATED WITHIN A RURAL AREA AS DESCRIBED ABOVE]

- ☐ Delineated area is in the entire Central Business Area (CBA) of _____
☐ Delineated area expands beyond the CBA of _____ in order to provide for adequate competition [MUST CONTINUE TO INCLUDE THE ENTIRE CBA IN SUCH EXPANDED AREAS]
☐ Delineated area includes a portion of the CBA of _____ due to the following mission-related reason(s): _____

Delineated area street boundaries are: _____

- ☐ Delineated area is outside of any CBA due to the following mission-related reason(s): _____
[EXAMPLES MAY INCLUDE THE NEED TO BE LOCATED NEAR AN AIRPORT OR TO BE WITHIN A SPECIFIC ZIP CODE]

b) Sustainability and Transportation Infrastructure and Plans (GSA ADM 1097.1, Section 4(b))

Fixed-guideway transit available in the metro region: [FIXED-GUIDEWAY TRANSIT IS DEFINED AS A PUBLIC TRANSPORTATION FACILITY USING AND OCCUPYING A SEPARATE RIGHT-OF-WAY OR RAIL FOR THE EXCLUSIVE USE OF PUBLIC TRANSPORTATION]

- ☐ No
☐ Yes

- ☐ Delineated area includes fixed-guideway transit
☐ Delineated area does not include fixed-guideway transit for the following reason(s): [IDENTIFY STRATEGY TO INCORPORATE TRANSPORTATION FACTORS INTO THE ACQUISITION PROCESS] _____

c) Sustainability of New and Existing Infrastructure (GSA ADM 1097.1, Section 4(c))

(i) Is new lease construction probable: [NEW LEASE CONSTRUCTION MAY BE NECESSARY IF THE MARKET SURVEY INDICATES THAT THERE ARE FEW OR NO BUILDINGS THAT CAN MEET THE MINIMUM REQUIREMENTS OF THE AGENCY WITHIN THE DELINEATED AREA (E.G., AN AGENCY WITH A LIMITED DELINEATED AREA REQUIRING STORAGE SPACE WITH UNUSUAL HEIGHT REQUIREMENTS) AND THE TIMEFRAME FOR DELIVERY OF THE SPACE COULD ALLOW FOR NEW CONSTRUCTION.]

- ☐ No
☐ Yes

(ii) If new construction is the only acceptable solution, discuss any site issues: _____ [MAY INCLUDE THE FOLLOWING: ASSIGNABLE PURCHASE OPTION/DEVELOPER-PROVIDED SITE, DUE DILIGENCE, SETBACKS, ETC]

d) Protection of the Natural Environment (GSA ADM 1097.1, Section 4(d))

i) Wetlands and/or floodplains: [ONLY CHOOSE ONE]

- ☐ Are not present within the delineated area
☐ Are present within the delineated area
☐ Unknown

ii) Other NEPA considerations: _____

Section III: Other Delineated Area Considerations

- a) ☐ Delineated area has definable boundaries
b) ☐ Delineated area does not unreasonably restrict competition
c) Describe any pending or unresolved housing issues, otherwise, insert "none": _____

11. Lease Terms [INITIAL TERM INCLUDES THE FIRM TERM (GOVERNMENT DOES NOT HAVE TERMINATION RIGHTS DURING THIS

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PERIOD) AND NON-FIRM OR "SOFT" TERM (GOVERNMENT HAS TERMINATION RIGHTS AT ANY TIME DURING THIS PERIOD). USUALLY, THE SOFT TERM WILL REFLECT A DROP-OFF IN THE TI PORTION OF THE RENT. CLICK "YES" ON RENEWAL OPTIONS ONLY WHEN ACTION INVOLVES A KNOWN RENEWAL OPTION TO BE INCLUDED IN THE RLP OR TO BE EXERCISED.]

a) Initial Term in Months: _____ Estimated Lease Term: From: _____ To: _____

i) Firm Term in Months: _____

ii) Soft Term in Months: _____

b) Renewal Option(s) ☐ Yes ☐ No

If Yes, Option 1 Term: _____ Option 2 Term: _____ [ADD ADDITIONAL OPTIONS AS NEEDED]

12. Total Contract Value (including any options)

NOTE: FORMAT BELOW REFLECTS TYPICAL LEASE TRANSACTION; REVISE AS NEEDED FOR EXPANSION, EXTENSION, AND RENEWAL TRANSACTIONS. RATES SHOULD REFLECT THE MARKET DATA, EXCLUDING OUTLIERS (HIGH AND LOW) OR THE RATE THAT BEST REFLECTS THE ANTICIPATED PROCUREMENT RESULTS, WHICHEVER IS HIGHER. RATES SHOULD REFLECT MARKET COMPARABLES SIMILAR TO THE REQUIREMENT.

a) Initial Term:

i) Firm Term: \$XX.XX rate/rsf x XXX,XXX rsf = XXX,XXX (Annual Rent) x X years = \$XX,XXX,XXX

ii) Soft Term: \$XX.XX rate/rsf x XXX,XXX rsf = XXX,XXX (Annual Rent) x X years = \$XX,XXX,XXX

FILL IN B AND C ONLY WHEN RENEWAL OPTIONS WILL BE REQUIRED UNDER THE RLP. OTHERWISE, DELETE.

b) Option 1: \$XX.XX rate/rsf x XXX,XXX rsf = XXX,XXX (Annual Rent) x X years = \$XX,XXX,XX

c) Option 2: \$XX.XX rate/rsf x XXX,XXX rsf = XXX,XXX (Annual Rent) x X years = \$XX,XXX,XX

d) Total Contract Value:

Firm Term Total \$XX,XXX,XXX + Soft Term Total \$XX,XXX,XXX + Renewal Option(s) Total \$XX,XXX,XXX = \$XX,XXX,XXX

e) Fully Serviced: ☐ Yes ☐ No If No, then Net of _____

13. Prospectus Requirement Check [To demonstrate that a prospectus should not be prepared and submitted to Congress, compare the anticipated average net annual rent (fully serviced rent less operating expenses) of a proposed lease action to the prospectus threshold that applies to the fiscal year of lease award. If the net rent is above or within 90% of the prospectus threshold, contact portfolio for further guidance on preparing the appropriate approval package.]

NOTE: PROSPECTUS THRESHOLDS: \$2,850,000.00 FOR FISCAL YEAR 2016; \$2,850,000.00 FOR FISCAL YEAR 2017.

a) Is a Prospectus required: ☐ Yes ☐ No

b) If yes, has a Prospectus been prepared: ☐ Yes ☐ No

If yes, provide Prospectus number: _____

Approved by House: ☐ Yes ☐ No Senate: ☐ Yes ☐ No

If no to either, explain the status: _____

14. Customer Funding Availability

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- a) Pro Forma (Draft) OA: signed by Customer:
☐ Yes
☐ Sent, but not signed
☐ Not required (extensions at current rent)
- b) OA type:
☐ Cancelable
☐ Non-Cancelable [DESIGNATION MUST BE MADE IN CONSULTATION WITH PORTFOLIO; MAJORITY OF OAs SHOULD BE CANCELABLE]
- If non-cancelable, provide reason: _____
- c) RWA anticipated:
☐ Yes
Describe purpose of the RWA: _____
☐ No
- d) Has the Customer Agency budgeted for move costs:
☐ Yes
☐ No
☐ N/A (anticipated sole source actions)

B. COMMUNICATION PLAN

1. Team Matrix (INCLUDE ALL TEAM MEMBERS SUCH AS CLIENT AGENCY, TECHNICAL ADVISORS/RESOURCES, ASSET MANAGER, PROPERTY MANAGER, BROKER CONTRACTOR, ETC) EXPAND TABLE AS NEEDED.

Name/Email	Role	Phone Number

2. Stakeholder communication preferences (EXPAND TABLE AS NEEDED)

Audience	Approach	Timing

C. ACQUISITION STRATEGY/PLAN OF ACTION

1. Risk and Opportunity Management [IDENTIFY POTENTIAL RISKS TO THE PROJECT. THESE RISKS MUST BE TAILORED TO REFLECT PROJECT SPECIFIC RISKS. ASSIGN A RATING TO THE LIKELIHOOD AND IMPACT OF EACH RISK OF HIGH (H), MEDIUM (M), OR LOW (L). CLASSIFY THE RISK BASED ON THE LIKELIHOOD AND IMPACT RATINGS. ANY RISK CLASSIFIED AS HIGH MUST HAVE A MITIGATION PLAN.]

Risk/Opportunity Name and	Likelihood	Impact	Classification	Mitigation Plan
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Description (Example: Pre-award - Lack of Competition)	(H/M/L)	(H/M/L)	(H/M/L)	

2. Describe any support required from other business lines:

- ☐ IGE
- ☐ Construction Drawing Review
- ☐ Source Selection Panel Participation
- ☐ Construction Management
- ☐ Project Management
- ☐ Other _____

Has a request been sent to the regional representative for these services along with a copy of the milestone schedule:

- ☐ Yes
- ☐ No

3. Indicate whether the GSA Leasing Support Services (GLS) Contract will be utilized to perform this acquisition:

- ☐ Yes
- ☐ No

4. Results of Market Research

a) On (Date) market research was conducted by using the following source(s) _____. The market research identified X (number) potential buildings within the delineated area that could satisfy the requirement. [\[ATTACH MARKET RESEARCH DATA\]](#)

b) LCRM-related indices:

i) REIS data attained for this market: ☐ Yes ☐ No ☐ Not available

ii) Relevant published market data attained for this market: ☐ Yes ☐ No ☐ Not available

5. Environmental/Energy Conservation Objectives: [\[THIS IS STANDARD LANGUAGE AND SHOULD NOT BE CHANGED, UNLESS NOT APPLICABLE FOR THE TYPE OF ACTION \(E.G., LEASE EXTENSION\)\]](#)

The lease resulting from this action will include "green" clauses in conformity with the latest PBS policies.

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6. Security: [THIS IS STANDARD LANGUAGE AND SHOULD NOT BE CHANGED, UNLESS NOT APPLICABLE FOR THE TYPE OF ACTION (E.G., LEASE EXTENSION)]

The client agency, GSA, and the Federal Protective Service will meet and determine the security level for this requirement taking into consideration the Interagency Security Council standards. [If THIS IS A CONTINUING NEED, EXPANSION, OR CONTINUING NEED WITH EXPANSION INDICATE THE CURRENT FPS SECURITY LEVEL.] The current security level is: (ONLY CHOOSE ONE) 1, 2, 3, or 4. [DELETE THIS PARAGRAPH IF IT IS NOT A CONTINUING NEED, EXPANSION, OR CONTINUING NEED WITH EXPANSION]

7. Small Business Considerations: [THIS IS STANDARD LANGUAGE AND SHOULD NOT BE CHANGED, UNLESS NOT APPLICABLE FOR THE TYPE OF ACTION (E.G., LEASE EXTENSION)]
If the lessor is a large business, then the lessor will be required to complete a Small Business Subcontracting Plan for inclusion as part of the lease.
8. Delivery and Performance Period Requirements: [THIS IS STANDARD LANGUAGE AND SHOULD NOT BE CHANGED, UNLESS NOT APPLICABLE FOR THE TYPE OF ACTION (E.G., LEASE EXTENSION)] The RLP/Lease will establish reasonable delivery and performance requirements. All buildings must meet the minimum requirements of the RLP/Lease.
9. Discuss other matters, if any, pertinent to the Acquisition Plan that are not covered elsewhere. If none, indicate "N/A": _____

10. Lease Administration Post Occupancy

- | | | |
|--|------------------------------|-----------------------------|
| a) Lease Enforcement through Field Office: | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| b) Tax and Operating Cost Escalations: | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| c) Contracting for Separately Metered Utilities: | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| d) Delegated: | <input type="checkbox"/> Yes | <input type="checkbox"/> No |

11. After project completion, close-out activities will include

Activity	Performed By
File review	
All documents uploaded into G-REX for permanent electronic storage	
RBM data input	
Post occupancy evaluation	
Other <u>[INSERT ACTIVITY]</u>	

A file review will be completed in accordance with national and regional guidelines to ensure the accuracy and completeness of project file documentation. All documents will be uploaded into G-REX for permanent electronic storage. Notification of the completed project will be sent to the service center to provide post occupancy administration and a COTR letter will be issued to the assigned property manager.

NOTE: PBS MUST PROVIDE CUSTOMER AGENCIES WITH "PBS STANDARD MILESTONE SCHEDULE" FOR EVERY PROJECT (CAPTURED IN G-REX UNDER THE 15 CUSTOMER MILESTONES SCHEDULE FOR MOST TYPES OF TRANSACTIONS). ATTACH THE G-REX CUSTOMER MILESTONE REPORT TO THIS DOCUMENT. FOR CERTAIN TRANSACTION (RENEWAL, EXTENSIONS, EXPANSIONS), THE MILESTONE EVENTS ATTACHED MUST BE CHANGED TO REFLECT THE RESPECTIVE PROJECT ACTION. FOR EXAMPLE, A RENEWAL ACTION WOULD NOT REQUIRE ISSUANCE OF AN RLP, BUT SHOULD INSTEAD INDICATE THE DATE TO "EXERCISE OPTION." KEY PROJECT EVENTS (AWARD AND EFFECTIVE DATES) IN SYSTEMS [REXUS AND G-REX] MUST MATCH MILESTONE EVENTS.

D. ATTACHMENTS

- ☐ Market Research
☐ Customer Milestone Schedule

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E. REVIEW, CONCURRENCE, AND APPROVAL [NOTE: PREPARER MUST MODIFY "CONCURRENCE" AND "APPROVAL" LEVELS BASED ON THE THRESHOLD MATRIX CHART BELOW]

THRESHOLDS (INCLUDING ALL OPTIONS)	APPROVING OFFICIAL
BELOW THE SIMPLIFIED LEASE ACQUISITION THRESHOLD (SLAT) DEFINED IN GSAM PART 570	LEASE CONTRACTING OFFICER
SLAT TO AND INCLUDING \$5.5 MILLION	ONE LEVEL ABOVE LEASE CONTRACTING OFFICER
OVER \$5.5 MILLION TO AND INCLUDING \$20 MILLION	CONTRACTING DIRECTOR/REAL ESTATE DIRECTOR
OVER \$20 MILLION TO AND INCLUDING \$50 MILLION	REGIONAL OR DEPUTY COMMISSIONER, PBS.
OVER \$50 MILLION	HCA (REGIONAL COMMISSIONER)
ANY DOLLAR VALUE THAT IS COMPLEX OR CRITICAL TO AN AGENCY'S STRATEGIC OBJECTIVES AND MISSION, HIGHLY VISIBLE, OR POLITICALLY SENSITIVE	HCA (REGIONAL COMMISSIONER)
ACTIONS ABOVE SLAT INVOLVING BEST VALUE TRADEOFF SOURCE SELECTION MUST OBTAIN LEGAL REVIEW. ACTIONS \$6.5 MILLION OR MORE MUST OBTAIN CONCURRENCE BY THE REGIONAL OFFICE OF SMALL BUSINESS UTILIZATION. ACTIONS ABOVE \$20 MILLION AGGREGATE MUST OBTAIN LEGAL REVIEW.	

**PROJECT MANAGEMENT AND ACQUISITION PLAN
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Prepared by:

Typed Name
Project Manager/Leasing Specialist

Date

Concurred by:

Typed Name
Lease Contracting Officer (LCO)

Date

Concurred by:

Typed Name
One Level above LCO (if applicable)

Date

Concurred by:

Typed Name
Regional Office of Small Business Utilization (if applicable)

Date

Concurred by:

Typed Name
Leasing Director (if applicable)

Date

Approved by:

Typed Name
PBS Regional Commissioner (if applicable)

Date

ACTION REQUIRED:

CHOOSE SUB-PARAGRAPH A, SUB-PARAGRAPH B, BOTH A AND B, OR DELETE ALTOGETHER, DEPENDING UPON THE CHARACTERISTICS OF THE DELINEATED AREA.

DELETE FOR SOLE SOURCE SUCCEEDING OR SUPERSEDING LEASE ACTIONS REMAINING AT THE CURRENT LOCATION.

AS NEEDED, SUBSTITUTE MILES OR FEET FOR THE DISTANCE VARIABLES IN THE PARAGRAPHS BELOW. THESE ARE STANDARD MEASUREMENTS. CITY BLOCKS VARY IN LENGTH AND DO NOT ALLOW USEFUL COMPARISONS OF DISTANCE.

LEASE CONTRACTING OFFICER/LEASING SPECIALIST MUST FILL IN THE PARKING VARIABLE, BELOW, WITH A REASONABLE AMOUNT, IN CONFORMANCE WITH LOCAL MARKET PRACTICE.

1.04 NEIGHBORHOOD, PARKING, LOCATION AMENITIES, AND PUBLIC TRANSPORTATION (DEC 2015)**A. Neighborhood and Parking: Inside City Center:**

Space shall be located in a prime commercial office district with attractive, prestigious, and professional surroundings with a prevalence of modern design and/or tasteful rehabilitation in modern use. Streets and public sidewalks shall be well maintained. The parking-to-square-foot ratio available on-site shall at least meet current local code requirements, or in the absence of a local code requirement, on-site parking shall be available at a ratio of one (1) space for every **XX** RSF of Space.

B. Neighborhood and Parking: Outside City Center:

Space shall be located 1) in an office, research, technology, or business park that is modern in design with a campus-like atmosphere; or, 2) on an attractively landscaped site containing one or more modern office Buildings that are professional and prestigious in appearance with the surrounding development well maintained and in consonance with a professional image. The parking-to-square-foot ratio available on-site shall at least meet current local code requirements, or, in the absence of a local code requirement, on-site parking shall be available at a ratio of one (1) space for every **XX** RSF of Space.

NOTE: LEASE CONTRACTING OFFICER/LEASING SPECIALIST MAY AMEND THE LANGUAGE IN THE FOLLOWING SUB-PARAGRAPH, INCLUDING THE NUMBER OF REQUIRED INSTANCES OF AMENITIES, BASED ON AN AGENCY'S MISSION NEED AND WHAT AMENITIES OR SERVICES ARE AVAILABLE WITHIN THE MARKET.

NOTE: THE DIVERSE USE CATEGORY TABLE BELOW WAS DERIVED FROM LEED® GUIDANCE.

C. Walkability and Amenities:

1. Employee and visitor entrances of the Building must be connected to public sidewalks by continuous, accessible sidewalks.

2. A variety of employee services, such as restaurants, retail shops, cleaners, and banks, shall be located within the immediate vicinity of the Building. The primary functional entrance of the Building shall be within safely accessible, walkable 2,640 foot distance of at least **seven (7)** instances of amenities, two of which must be inexpensive or moderately priced fast-food or eat-in restaurants. The remaining **five (5)** instances must fall within at least 2 of the Diverse Use Categories shown below:

Diverse Use Category	Uses
Food Retail	Supermarket, Other food store with produce
Community-Serving Retail	Clothing store or department store selling clothes, Convenience store, Farmer's market, Hardware store, Pharmacy, Other retail
Services	Bank, Gym, Health club, Exercise studio, Hair care, Laundry, Dry cleaner, Restaurant, Café, Diner (excluding establishments with only drive-throughs)
Civic and Community Facilities	Adult or senior care (licensed), Child care (licensed), Community or recreation center, Cultural arts facility (museum, performing arts), Educational facility (including K-12 school, university, adult education center, vocational school, community college), Family entertainment venue (theater, sports), Government office that serves public on-site, Place of worship, Medical clinic or office that treats patients, Police or fire station, Post office, Public library, Public park, Social services center

To be considered, amenities must be accessible from the Building by continuous sidewalks, walkways, or pedestrian crosswalks. Amenities must be existing or the Offeror must demonstrate to the Government's reasonable satisfaction that such amenities will exist by the Government's required occupancy date.

ACTION REQUIRED:

CHOOSE ONE OF THE FOLLOWING 3 SUB-PARAGRAPHS.

NOTE: LEASE CONTRACTING OFFICER/LEASING SPECIALIST MAY DELETE THIS SUB-PARAGRAPH ENTIRELY IN MARKETS WHERE NO PUBLIC TRANSPORTATION IS AVAILABLE, OR WHERE PROHIBITED BASED ON AN AGENCY'S

MISSION NEED (E.G., ATF SPACE WHERE EXPLOSIVE MATERIAL IS STORED OR DOD SPACE REQUIRED TO BE BY A BLACK FIBER OPTIC LINE).

NOTE: THE LEASE CONTRACTING OFFICER/LEASING SPECIALIST MAY ALSO REVISE THE DISTANCES AND TRIPS STATED WITHIN THIS SUB-PARAGRAPH BASED ON AN AGENCY'S MISSION NEED OR WHAT TYPE OF PUBLIC TRANSPORTATION IS AVAILABLE WITHIN THE MARKET.

VERSION 1: (SUBWAY, LIGHT RAIL, OR BUS RAPID TRANSIT (BRT) SERVICE REQUIREMENTS)

NOTE: USE WHERE SUBWAY, LIGHT RAIL, OR BRT SERVICE EXISTS (REGARDLESS OF WHETHER OR NOT PUBLIC BUS SERVICE, STREETCAR, OR COMMUTER RAIL EXISTS).

NOTE: THIS SUB-PARAGRAPH REFLECTS THE OPTIMUM LEVEL OF TRANSIT.

D. Transit Accessibility: A subway, light rail, or bus rapid transit stop shall be located within the immediate vicinity of the Building, but generally not exceeding a safely accessible, walkable 2,640 feet from the principal functional entrance of the building, as determined by the LCO.

VERSION 2: (BUS OR STREETCAR SERVICE REQUIREMENTS)

NOTE: USE WHERE BUS OR STREETCAR SERVICE EXISTS AND THERE IS NO SUBWAY, LIGHT RAIL, OR BRT SERVICE (REGARDLESS OF WHETHER OR NOT COMMUTER RAIL SERVICE EXISTS).

NOTE: LCO MAY REVISE THE NUMBER OF BUS OR STREETCAR LINES BASED ON SERVICE AVAILABILITY IN THE MARKET, AFTER CONSULTATION WITH LOCAL OFFICIALS OR TRANSIT AGENCY.

NOTE: THIS SUB-PARAGRAPH REFLECTS THE SECOND-MOST OPTIMUM LEVEL OF TRANSIT.

D. Transit Accessibility: Stops for two or more public bus or streetcar lines usable by tenant occupants and their customers shall be located within the immediate vicinity of the Building, but generally not exceeding a safely accessible, walkable 1,320 feet from the principal functional entrance of the Building, as determined by the LCO. Stops for commuter bus service do not meet this requirement. Combined, the bus or streetcar stops must provide at least **XX** [RECOMMENDED: 60, BUT LCO SHOULD INPUT THE NUMBER OF TRIPS BASED ON BUS SERVICE AVAILABILITY IN THE MARKET, AFTER CONSULTATION WITH LOCAL OFFICIALS OR TRANSIT AGENCY] trips per weekday or trip headways (time between each vehicle) of no less than **XX** [RECOMMENDED: 15 MINUTES, BUT LCO SHOULD INPUT THE NUMBER OF MINUTES BASED ON BUS SERVICE AVAILABILITY IN THE MARKET, AFTER CONSULTATION WITH LOCAL OFFICIALS OR TRANSIT AGENCY] minutes during business hours. Qualifying transit routes must have paired route service (service in opposite directions during all posted service times) during business hours. Only trips in one direction are counted towards the threshold. If a qualifying transit route has multiple stops within the required walking distance, only trips from one stop are counted towards the threshold. Transit service must be existing or the Offeror must demonstrate to the Government's reasonable satisfaction that such transit service will exist by the Government's required occupancy date.

VERSION 3: (COMMUTER RAIL SERVICE REQUIREMENTS)

NOTE: USE WHERE COMMUTER RAIL SERVICE EXISTS AND THERE IS NO SUBWAY, LIGHT RAIL, BRT, BUS, OR STREETCAR SERVICE.

NOTE: A COMMUTER RAIL SYSTEM (E.G., METRO-NORTH RAILROAD, METRA, ETC.) OPERATES AS PASSENGER TRAINS OVER CONVENTIONAL RAILROAD TRACKS. IT CAN BE ELECTRICALLY POWERED OR OPERATE IN TRAINS PULLED BY DIESEL LOCOMOTIVES TYPICALLY USED BY COMMUTERS TRAVELING FROM SUBURBS TO THE CBA.

NOTE: THIS SUB-PARAGRAPH REFLECTS THE THIRD-MOST OPTIMUM LEVEL OF TRANSIT.

D. Transit Accessibility: A commuter rail station shall be located within the immediate vicinity of the Building, but generally not exceeding a safely accessible, walkable 2,640 feet from the principal functional entrance of the Building, as determined by the LCO. The station must provide paired route service (service in opposite directions during all posted service times) during business hours, and provide at least 24 trips per weekday. Only trips in one direction are counted towards the threshold.