



# GSA PBS Planning and Requirements Process Fact Sheet

## *Standard Milestones for a Common Goal*

### Background and Benefits

In 2016, GSA's Public Buildings Service (PBS) introduced a planning lifecycle in which the requirements development phase of a project begins at least 36 months prior to Occupancy Agreement (OA) expiration.

This new process standardize requirements terminology, identify and assign project task ownership, and establish milestone dates for all projects.

Through this new process and an emphasis on project planning activities and requirements standardization, we anticipate our customers will:

- ✓ **Reduce Spending**
- ✓ **Reduce Real Estate Footprint**
- ✓ **Better Utilize Space**

### What Are The Different Types of Requirements?

**Strategic Requirements** represent high level information that establish basic project parameters. This information includes existing occupancy information, total square feet, approximate headcount, location, use of space, parking, and utilization rate (UR) for the follow on project. Identifying strategic requirements on time is critical to a project's overall success.

**Functional Requirements** are developed from the strategic requirements by the GSA Project Manager and project team. This refined data set defines the new space's parameters, operations, expectations, schedule, and cost goals. Functional requirements include, but are not limited to, a verified total square footage, headcount, and geographic location. The Project Manager reviews the functional requirements and the initial project management plan/schedule with the customer at the project kick-off meeting.

**Technical Requirements** refine the strategic requirements into the specific details needed to deliver the project. Technical requirements include agency-specific requirements, agency-specific security information, basic space plans and adjacency plans. This is the final step in the requirements-gathering process before a Request for Lease Proposals (RLP) can be issued or a construction project can begin in owned locations. These details will inform the Project Management Plan. Note: Initial schedule, costs, and an OA will be shared prior to lease award.

### Client Project Agreement

The Client Project Agreement (CPA) is a collaborative document that helps define a project's strategic requirements and other occupancy considerations. The Regional Planning Manager and other GSA team members will work with you on completing the CPA



## GSA PBS Project Lifecycle & Customer Requirements Development Timeline

(Milestone dates apply to expiring customer occupancy projects only)

Project Phase	Non-Prospectus Projects	Prospectus Projects	GSA Point of Contact*
<b>Identification</b> <ul style="list-style-type: none"> <li>Determine Strategic Requirements</li> <li>Sign Client Project Agreement (CPA)**</li> <li>Draft OA Sent (not mandatory)</li> </ul>	36-30 months prior to OA expiration	18-12 months prior to OMB submission	Regional Planning Manager
<b>Initiation</b> <ul style="list-style-type: none"> <li>Assign Project Manager</li> <li>Project Team Kick Off</li> <li>Develop Preliminary Schedule and Budget</li> </ul>	30-29 months prior to OA expiration	12-11 months prior to OMB submission	Project Manager
<b>Planning</b> <ul style="list-style-type: none"> <li>Determine Technical Requirements</li> <li>Finalize Project Management Plan, Schedule, and Budget</li> <li>Obtain Funding Commitment, Sign Draft OA</li> </ul>	29-24 months prior to OA expiration	53-36 months prior to OA expiration (aligns with CILP*** date)****	Project Manager
<b>Execution</b> <ul style="list-style-type: none"> <li>Determine Final Requirements Package</li> <li>Request Lease/RFP Issued</li> <li>Project Award/Design/Construction</li> </ul>	24-0 months prior to OA expiration	36-0 months*****	Project Manager
<b>Closeout</b> <ul style="list-style-type: none"> <li>Final inspections/punchlist</li> <li>OA Finalized to begin Rent Payments</li> </ul>	Substantial Completion	Substantial Completion	Project Manager

\* Certain PBS personnel, such as the Lease Contracting Officer, will remain involved at multiple phases

\*\*Or other form of written documentation showing acceptance of the strategy in the CPA

\*\*\* Capital Investment and Leasing Program Prospectus (CILP)

\*\*\*\* Once strategic requirements are identified, project manager secures technical requirements over next 24 months

\*\*\*\*\* Typical duration, actual schedule may vary

### For More Information

To learn more about the PBS project lifecycle and requirements gathering process, contact your GSA customer lead or planning manager.