

# FACT SHEET

## PBS Planning and Requirements Process

### Background and Purpose

In 2016, GSA PBS introduced a new timeline for the PBS project lifecycle that focuses on earlier requirements development. These changes standardize terminology, ownership, and milestone dates for both Capital Investment and Lease Program (CILP) Prospectus and non-prospectus project development and execution. With its emphasis on upfront planning, this new process will:

- Reduced customer agency spending
- Reduced federal real estate footprint
- Better utilization of space

### PBS Project Lifecycle & Requirements Development Timeline

(for new and expiring customer space projects)

Project Phase	Prospectus Projects	Non-Prospectus Projects
<b>Identification</b> <ul style="list-style-type: none"> <li>• Determine Strategic Requirements</li> <li>• Signed Client Project Agreement</li> <li>• Signed Draft Occupancy Agreement</li> </ul>	18-12 months prior to OMB Submission	36-30 months prior to expiring Occupancy Agreement
<b>Initiation</b> <ul style="list-style-type: none"> <li>• Project Team Kick Off</li> <li>• Determine Functional Requirements</li> <li>• Early Schedule and Budget Developed</li> </ul>	12-11 months prior to OMB Submission	30-29 months prior to expiring Occupancy Agreement
<b>Planning</b> <ul style="list-style-type: none"> <li>• Determine Technical Requirements, Finalize PM Plan, Schedule, and Budget</li> <li>• Obtain Funding Commitment</li> </ul>	53-36 months (aligns with CILP date*)	29-24 months prior to expiring Occupancy Agreement
<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>	36-0 months**	24-0 months
<b>Closeout</b> <ul style="list-style-type: none"> <li>• Final Inspections/Punchlist</li> <li>• Rent Payments Begin</li> </ul>	Substantial Completion	Substantial Completion

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

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



## 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 National Planning Manager will begin the CPA and work with you to complete the document.

## Requirements Overview

**STRATEGIC REQUIREMENTS** represent high level information that helps establish basic project parameters. This type of information includes total square feet, approximate headcount, location, use of space, parking, and existing space information. Early determination of a project's strategic requirements is critical to its overall success.

**FUNCTIONAL REQUIREMENTS** are developed from the strategic requirements by the GSA project manager and project team. This refined set of data defines the new space's parameters, operations, expectations, schedule, and cost goals. Functional requirements provide the project team with a verified total square footage, headcount, and geographic location, among other details. The project manager introduces the functional requirements and the initial project management plan/schedule to the client at the project kick-off meeting.

**TECHNICAL REQUIREMENTS** further refine the strategic and functional requirements into the specific details needed to deliver the project to meet all expectations. 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. These details will inform the Project Management Plan.

