PM Guide

Traditional
Design/Build (D/B)
Design/Build-Bridging (D/B-B)
Construction Management as Constructor (CMc)

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc
This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMC

Project Coordination exists at every level.
2.0.0.0.0 Planning

Traditional

2.1.0.0.0 Pre-Project Planning (Overview)

Is it a capital project?

No → ABT prioritizes in small projects process (BA54)

Yes → Commence FS

2.4.1.0.0.a

Select the best alternative

Select project delivery method and prepare PMP and AQP

1.1.1.0.0.0.b

Overview of Capital Investment and Leasing Program (CILP) process

Prepare Site Prospectus Submission

To be developed in Phase II

Prepare Design/Build Prospectus Submission

Prepare Design/Build Authorization

Prepare Lease Prospectus Submission

Lease PDS

Lease Construction Authorization

Pre-Project (Preliminary) Planning

2.1.0.0.0.1

This page applies to:

☑ Traditional ☑ D/B ☑ D/B-Bridging ☑ CMc

Project Coordination exists at every level

GSA - Public Buildings Service
2.0.0.0.0.1 Pre-Project (Preliminary) Planning

Identify need/driver

Can request be met in existing space?

No

Initiate FS

2.4.1.0.0.0.a

Yes

Is it below prospectus?

No

Prepare Initial Draft OAs

8.1.0.0.0.0

Prepare Draft PMP

1.1.1.0.0.0.b

Submit Site and Design Prospectus

Receive authority to start A/E and site procurements

Verify site design funding?

See A/E Selection Process and CMa

Yes

No

Obtain agency requirements

Define Facility
Master Plan
2.1.1.0.0.0

Define BER Requirements
2.1.3.0.0.0

Meet request in BA54 Program Small Projects Process

Submit construction prospectus

Prepare PDS
2.5.0.0.0.0

Perform informal site selection tasks in support of NEPA, NHPA, and due diligence

Review programming and cost estimates

No, R&A

Is it new construction?

Yes

Prepare PDS
2.5.0.0.0.0

Conduct programming and review benchmarks (OCA-GCCRG)
1.0.0.0.0 Project Management Documents

Traditional

1.1.0.0.0.a Project Coordination

Assemble Project Team 1.1.1.0.0.a

PMP 1.1.1.0.0.b

Design Start-up Workshop 6.1.1.0.1.0

PIP

Project Website(s) 1.1.5.0.0.0

Project Coordination exists at every level

Pre-Project (Preliminary) Planning 2.1.0.0.0.1

LINKS

Pre-Project (Preliminary) Planning 2.1.0.0.1
Feasibility 2.4.1.0.0.0.a

PDS 2.5.0.0.0.0
Site Acquisition 4.0.0.0.0.0.a

This page applies to:

☑ Traditional ☑ D/B ☑ D/B-Bridging ☑ CMc

GSA - Public Buildings Service

Planning Page 4
1.0.0.0.0 Project Management Documents

Traditional

1.1.0.0.0.a PMP: Assemble Project Team

Asset Manager assembles Project Team

Team Members
1. Customer
2. Asset Manager
3. Project Manager
4. Contracting Officer
5. Property Manager(s)
6. Realty Specialist
7. Regional Account Manager(s)
8. GSA Specialists*
9. DHS/FPS Representative
10. FTS and FSS Representatives
11. Regional NEPA Program Coordination
12. Regional Historic Preservation Officer

The Project Team evolves over the life of the project. Initially, the Asset Manager assembles and leads the Asset Business Team (ABT) or Project Team through completion of the FS and preparation of Site and Design Prospectus. The PM will chair the Project Team after the Site and Design Prospectus is submitted to Congress.

*GSA Specialist - including, but not limited to:
- Regional Accessibility Officer
- Regional Fire Protection Engineer
- Regional Industrial Hygienist
- Regional Appraiser
- Regional Energy Coordinator
- Regional HVAC Design Advocate

LINKS

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc

Existing Conditions Assessments 2.1.12.0.2.0

GSA - Public Buildings Service 1.1.1.0.0.0.a Planning Page 5
Existing condition assessments are required to develop scope and costs for R&A alternatives.

Project Team reviews existing information

Is additional information needed?

Yes

Obtain additional information
Include in FS
Include in PDS if D/B

No

Incorporate assessments into FS or PDS if D/B

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMC
LPPs are utilized by ABT to understand the overall inventory (leased and owned) and to determine if space requests may be satisfied in the existing inventory. If not, the ABT may choose to initiate a FS. LPPs are typically prepared in-house by the Asset Manager.

**Is it a capital project?**

- **Yes:** Project Team will study viable alternatives in FS
  - 2.4.1.0.0.a

**Will the agency request be satisfied within existing inventory?**

- **Yes:**
  - Project Team reviews appropriate LPP
- **No:**
  - ABT will prioritize in small projects process (BA54)

**Or**

- PDS if D/B
  - 2.5.0.0.0.0
Master Plans are useful for evaluating multi-tenant buildings, multi-building facilities, and local land use plans. This is a useful tool for developing an accurate housing plan and more accurate TI cost estimates. It provides the current strategy reinvestment for the property.

Project Team reviews current Master Plan

Would an updated Master Plan benefit the project?

- Yes
  - Project Team develops scope, obtains funding, and issues work order for Master Plan

- No
  - Respond to individual requests independently

Project Team confirms clients’ short-term and long-term needs

Update Master Plan as appropriate
2.0.0.0.0 Planning
Traditional

2.1.3.0.0 Building Engineering Report

Project Team reviews existing BER.

Is it necessary to proceed to next level?

Yes

Complete Level 4 BER to support capital project submission

No

Project Team reviews open work item inventory in IRIS.

Project Team evaluates and identifies all work items to be included in FS for R&A alternative.

BERs provide scope and cost estimates for building system's needs. A BER consists of 4 distinct levels. The first 3 levels are typically accomplished in-house. Level 4 is typically accomplished by contract to support capital projects.

Use Project Consultant Task Order 6.1.0.0.0.0.a

Include in FS Scope 2.4.1.0.0.0.a

Include in PDS if D/B 2.5.0.0.0.0

Property Manager/ABT should be consulted to ensure all work items are addressed in BER.

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc

GSA - Public Buildings Service

2.1.3.0.0.0 Planning Page 9
Accessibility surveys are used primarily in R&A projects to gain an understanding of accessibility deficiencies and associated costs, to be included in the R&A alternative.

**Project Team consults with Regional Accessibility Officer to determine existing information**

Is additional information needed?

- **Yes**: Obtain additional studies
  - Use Project Consultant Task Order 6.1.0.0.0.0.a
  - Include in FS Scope 2.4.1.0.0.0.a
  - Include in PDS if D/B 2.5.0.0.0.0

- **No**: Incorporate accessibility work items into project scope
Project Team consults with Regional Fire Protection Engineer to determine existing information.

Fire/Life Safety Studies are used primarily in R&A projects to gain an understanding of fire, life safety deficiencies, and any associated costs to be included in the R&A alternative.

Is additional information needed?

- **Yes**: Obtain additional studies
  - Use Project Consultant Task Order 6.1.0.0.0.0.a
  - Include in FS Scope 2.4.1.0.0.0.a
  - Include in PDS if D/B 2.5.0.0.0.0

- **No**: Incorporate Fire/Life Safety work items into project scope

**LINKS**

- PBS-P100

**This page applies to:**

- Traditional
- D/B
- D/B-Bridging
- CMc
Hazardous Materials Surveys are used to track and account for the presence of hazardous substances and to identify remediation, if required. In R&A projects, surveys identify the hazardous materials present and the associated costs for remediation. Surveys are also used in field office O&M plans.

1. Project Team consults with Regional IH to determine existing information

2. Is additional information needed?
   - Yes: Obtain additional information
   - No: Incorporate Hazardous Materials Survey information into building O&M plan and/or work items for project scope

3. Use Project Consultant Task Order 6.1.0.0.0.0.a
4. Include in FS Scope 2.4.1.0.0.0.a
5. Include in PDS if D/B 2.5.0.0.0.0
2.0.0.0.0 Planning

Traditional

2.1.6.0.0.0 Highest and Best Use Appraisal (R&A)

Project Team reviews current ABP

Does the appraisal for highest and best use need an update?

Yes → Obtain updated appraisal

No → Appraisal data included in FS for R&A alternative cost evaluation or PDS if D/B

Regional term contract

Use Project Consultant Task Order 6.1.0.0.0.0.a

Include in FS Scope 2.4.1.0.0.0.a

Include in PDS if D/B 2.5.0.0.0.0
Consult with FPS/DHS and Building Security Committee to determine applicability of a security charrette. The benefits of a security charrette will be optimized when completed during the FS for inclusion in project scope and budget. Project Team consults with FPS/DHS to determine required Safety/Security Studies.

 Conduct preliminary threat and risk analysis.

 Conduct protection level assessment/ISC Survey.

 Consult with FPS/DHS and Building Security Committee to determine applicability of a security charrette.

 Incorporate security recommendations into project scope and budget.
Project Team consults with Regional Energy Coordinator to determine existing information.

Is this an existing building?

Yes

Develop energy usage targets for new construction with central office

No

Is there an existing building energy audit?

Yes

Incorporate energy conservation measures and/or energy usage targets into project scope and budget

No

Consider alternate financing/incentives by partnering with DOE or local utility companies, as detailed in PBS-P100

Use Project Consultant Task Order 6.1.0.0.0.0.a

Include in FS Scope 2.4.1.0.0.0.a

Include in PDS if D/B 2.5.0.0.0.0
2.0.0.0.0 Planning

Traditional

2.4.1.0.0.a Feasibility

- Project Team prepares SOW for FS
- Award appropriate work to contractors
- Compile available technical studies
- Identify alternatives and implementation strategies
- Develop cost estimates by Shell and TI
- Identify agency-specific allowances (e.g., USMS)
- Asset Manager performs inventory analysis and financial analysis
- Conduct risk assessment for project alternatives
- Identify preferred alternative
- Identify project delivery method and A/E selection process
- Complete FS

- Coordinate NEPA Phase I and NHPA studies/consultations as needed to evaluate viable options and site information
- Feasibility: R&A
- Feasibility: New
- Feasibility: Lease
- Obtain necessary studies by contract

- If Project is planned for 1-year design cycle, complete PDS within 12 months of site/design prospectus submission. Utilize IDIQ or A/E.

- This page applies to:
  - Traditional
  - D/B
  - D/B-Bridging
  - CMc

LINKS

- DEP&P
- GSA Guidebook I – Acquisition of Real Property
- GSA Guidebook II – Relocation of Residents and Businesses
- NEPA
- NHPA
- PBS Pricing Desk Guide
- Pre-Project Planning Guide
- Preservation Desk Guide
- Pricing Implementation for Project Management
- PMP 1.1.0.0.0.b
- Pre-Project (Preliminary) Planning 2.1.0.0.0.1
- NHPA 2.2.0.0.0.0
- OAs and RENT (Overview) 2.1.0.0.0.0

Feasibility 2.4.1.0.0.a

PDS 2.5.0.0.0.0
Planning

Traditional

2.4.1.0.0.b Feasibility (Continued)

Complete FS

- Prepare initial draft OAs
- Prepare PMP
- Conduct PDRI
- Utilize cost estimating tool for design and M&I budgets

Submit site and design prospectus

Project Team will ensure design budget is adequate for CMa/CMc and CxA design phase services

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
2.4.1.0.0.0.b Feasibility (Continued)
3.0.0.0.0.0 Authorization/ Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design/Build
6.0.0.0.0.0 Design
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc

Links

- DE&P
- GSA Guidebook I – Acquisition of Real Property
- GSA Guidebook II – Relocation of Residents and Businesses
- NEPA
- NHPA
- PBS Pricing Desk Guide
- Pre-Project Planning Guide
- Pricing Implementation for Project Management
- Professional Services Estimating Tool
- PMP 1.1.1.0.0.0.b
- Pre-Project (Preliminary) Planning 2.1.0.0.0.1
- Existing Conditions Assessments 2.1.12.0.2.0
- Site Acquisition 4.0.0.0.0.0.a
- OAs and RENT (Overview) 8.1.0.0.0.0
6.3.0.0.0.0 CMA/Commissioning Authority (Cx) Services

The PPT contains WBS and detailed project tasks for Cx and QAPs.

The CMA and Cx services required during each stage of the project IAW current guidelines.

Programmatic discussion may be found in the Building Cx Guide.

Project Team determines level of CMA and Cx services required during each stage of the project IAW current guidelines.

Planning

- Cx Plan will be updated for the PDS and as needed by the Project Team.

- Develop preliminary Cx Plan and required budget in FS.

- Cx Plan will be updated for the PDS and as needed by the Project Team.

Design

- The CMA must be on board at the same time as the A/E for maximum benefit/input starting with design concepts.

- CxA services will also be maximized if on board at design concepts.

Construction

- CMa will perform services as detailed in the SOW and IAW CMAA Construction Management Standards of Practice.

- CxA executes Cx Plan as to performance, checklists, testing and progress reports.

Post Construction

- CMa will close out project as detailed in SOW. If also completing Cx services, the CMa will conduct all post-construction activities.

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc

LINKS

Building Cx Guide
PBS-P100
PPT
6.1.0.0.0.a Project Consultant Task Order

Special Project Consultants may be needed throughout the project process.

Project Team determines the need for consultants based on the specific needs of the project.

Project Team develops SOW.

Project Team determines the best method for obtaining consultant(s) and updates AQP.

Project Team obtains IGE.

CO issues RFP.

CO receives proposals.

CO evaluates proposals and prepares PNP.

CO completes contract evaluations and advises Project Team of pending award.

CO awards Project Consultant Contract.

Special consultants may be required for development of FS or PDS or as issues are identified.

IDIQ, FSS or stand-alone contract.

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMC
Feasibility: New Construction

Project Team conducts study based on construction type

- New construction scope developed

- Conduct site/market survey for cost data

- Confirm housing plan

- Use benchmark or GCCRG depending on construction type (courthouse, etc.) for cost estimate

New construction alternative has scope and budget data for analysis in Feasibility Phase

This page applies to:
- Traditional
- CMc
- D/B
- D/B-Bridging
- CMc

LINKS
- GSA Guidebook I – Acquisition of Real Property
- GSA Guidebook II – Relocation of Residents and Businesses
- PBS-P100
- PMP 1.1.1.0.0.0.b
- Pre-Project (Preliminary) Planning 2.1.0.0.0.1
- NEPA 2.3.0.0.0.0
2.0.0.0.0 Planning
Traditional

2.4.1.0.0.0.e Feasibility: Lease Construction

Project Team conducts study based on construction type

Confirm housing plan

Develop lease construction scope

Conduct market survey for cost data

Confirm leasing cost data with regional appraiser

Lease alternative has scope and budget data for analysis in Feasibility Phase

Capital Lease Construction Module to be developed in Phase II of PM Guide

LINKS

GSA Guidebook I - Acquisition of Real Property

GSA Guidebook II - Relocation of Residents and Businesses

PBS-P100

PMP 1.1.1.0.0.0.b

Pre-Project (Preliminary) Planning 2.1.0.0.0.1

NHPA 2.2.0.0.0.0

NEPA 2.3.0.0.0.0

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc
1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
   4.0.0.0.0.0.a Site Acquisition
3.0.0.0.0.0 Authorization/Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design/Build
6.0.0.0.0.0 Design
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc

GSA - Public Buildings Service

Feasibility
2.4.1.0.0.0.a

Planning Page 23
**2.0.0.0.0 Planning**  
*Traditional*

4.0.0.0.0.b Site Investigation Tasks for FS

---

**Project Team defines need for capital project**

- Is site ACQ required for capital project?
  - Yes: Project Team further defines site ACQ criteria
  - No: Project Team develops SOW for FS

**Include in PDS if D/B**

- 2.5.0.0.0.0

**Project Team** forms Site Selection Team

**Site Team orders special studies**

- *Special studies may include:*
  - Real Estate Market Survey
  - Real Estate Market Appraisal
  - Relocation Estimates - 2.6.0.0.0.0
  - NHPA - 2.2.0.0.0.0
  - NEPA - 2.3.0.0.0.0
  - GeoTech - etc.

**Site Team initiates preliminary site data**

- Project Team evaluates preliminary site data in FS or PDS if D/B

---

**Project Team** estimates site and relocation budget for site/design prospectus

---

**LINKS**

- Fact Sheet on Executive Order 13006

---

This page applies to:  
- Traditional  
- D/B  
- D/B-Bridging  
- CMc
The needs of the project will dictate the level of information study required.

Project Team will examine project needs and determine the level of informal investigation to be completed prior to formal Site Selection process.

Project Team assigns team roles and responsibilities.

Site studies are typically funded in BA61. Regional policy and funding levels will determine when certain studies are completed.

The process commences with the FS and continues through site selection, design and construction as project needs dictate.

All data is utilized in FS (or PDS if D/B) for determination of viable alternatives and associated cost impacts.

A process overview of Site, NHPA, Due Diligence, NEPA, et al., may be found in the Library of the PM Guide.
2.0.0.0.0 Planning

Traditional

2.2.0.0.0 NHPA Tasks for FS through Site Acquisition

RHPO initiates and continues consultation with SHPO as appropriate

Mitigate effect under consultation with SHPO

Discuss/negotiate potential mitigation measures with SHPO

Execute MOA/PA with SHPO/ACHP

Incorporate mitigation into design documents

Monitor MOA/PAs and mitigation throughout project delivery

This is an ongoing rather than an ending process

RHPO updates Project Team as needed

Budget for mitigation such as archaeology or HABS/HAER documentation, etc.

Copy of MOA/PA to Advisory Council on Historic Preservation

RHPO works with Regional NEPA Coordinator to integrate NEPA/NHPA public comment processes.

GSA Guidebook I – Acquisition of Real Property

Fact Sheet on Executive Order 13006

GSA Guidebook II – Relocation of Residents and Businesses

NHPA

PMP: Assemble Project Team

PMP 1.1.1.0.0.0.b

Planning 2.0.0.0.0

Relocation Planning 2.6.0.0.0

This page applies to:

√ Traditional √ D/B √ D/B-Bridging √ CMC
2.3.0.0.0.0 NEPA Tasks for FS through Site Acquisition

Project Team assigns roles and responsibilities

Project Team coordinates scope for FS to cover NEPA, NHPA, and informal site investigation studies

Include in PDS if D/B 2.5.0.0.0.0

Initiate NEPA in FS

Phase I may commence at Region’s discretion

Is this a CATEX?

Yes

NHPA completed

No

Regional NEPA Program Coordinator commences EA/EIS process

Gather data/hold public meeting

Publish document

Revise EA/EIS as needed

Is this a FONSI or ROD?

FONSI

FONSI - NEPA completed

ROD

This is an ongoing rather than an ending process

Incorporate NEPA mitigation into design documents

Monitor MOA/PAs and mitigation throughout project delivery

LINKS

GSA Guidebook I – Acquisition of Real Property
GSA Guidebook II – Relocation of Residents and Businesses

NEPA

NHPA

PMP: Assemble Project Team 1.1.1.0.0.0.a
PMP 1.1.1.0.0.0.b

Planning 2.0.0.0.0.0
Relocation Planning 2.6.0.0.0.0

This page applies to:

 Traditional  
 CMc  
 D/B  
 D/B-Bridging

GSA - Public Buildings Service 2.3.0.0.0.0 Planning Page 27
2.0.0.0.0 Planning

Traditional

2.6.0.0.0 Relocation Planning

Coordinate with RHPO and NEPA Coordinator as issues are identified

Is there site-related relocation or swing space?

Identify potential project sites and impacts from resident/business displacement

Review cost and schedule impacts for viable alternative sites

Incorporate relocation issues into site cost estimate for FS

Complete FS and prepare Site and Design Prospectus

Review cost and schedule impacts of required phasing/swing space

Prepare required lease AQP

Incorporate phasing/swing costs into FS and project budget

Compile site data and prepare Site Prospectus if D/B

Or

Update FS estimates during PDS for Construction Prospectus submission

2.0.0.0.0.0 Planning

2.6.0.0.0 Relocation Planning

1.0.0.0.0.0 Project Management Documents

3.0.0.0.0.0 Authorization/Funding

4.0.0.0.0.0 Site Acquisition

5.0.0.0.0.0 Design/Build

6.0.0.0.0.0 Design

7.0.0.0.0.0 Construction

8.0.0.0.0.0 Tenant Occupancy

PROJECT MAP

2.6.0.0.0.0 Planning

2.6.0.0.0.0.0 Relocation Planning

3.0.0.0.0.0 Authorization/Funding

4.0.0.0.0.0 Site Acquisition

5.0.0.0.0.0 Design/Build

6.0.0.0.0.0 Design

7.0.0.0.0.0 Construction

8.0.0.0.0.0 Tenant Occupancy

PLANNING

AUTHORIZATION/FUNDING

SITE ACQUISITION

DESIGN/BUILD

DESIGN

CONSTRUCTION

TENANT OCCUPANCY

GSA Guidebook II – Relocation of Residents and Businesses

PBS Pricing Desk Guide

Planning 2.0.0.0.0.0.a

Site Acquisition 4.0.0.0.0.0.a

Fact Sheet on Executive Order 13006

GSA Guidebook I – Acquisition of Real Property

LINKS

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc

Feasibility 2.4.1.0.0.0.a

GSA - Public Buildings Service

Planning Page 28

2.6.0.0.0.0
**1.1.2.0.0 Commissioning Authority (Cx) (Overview)**

The PPT contains WBS and detailed project tasks for Cx

**Project Team determines level of Commissioning (Cx) required during each phase of the project IAW current guidelines**

**Programmatic discussion may be found in the Building Cx Guide**

---

### Planning

- **Project Team** identifies lead on Cx task/team

### Design

- **Include Cx services in A/E, CMa and/or CxA Scopes of Work as determined by Project Team**

### Construction

- **CMa or CxA executes Cx Plan as to performance, checklists, testing and progress reports**

### Post Construction

- **CMa or CxA performs deferred/seasonal testing, warranty inspections, and completes Final Cx Report**

---

**Develop preliminary Cx Plan and required budget in FS**

**Update Cx Plan as building systems are identified and designed**

**Conduct owner training and Turnover Cx Record**

**Perform Satisfaction Review with tenants and submit findings to Project Team**

---

**Cx integrated into FS and updated in PDS**

**Contract documents aligned with GSA/PBS' Project Requirements**

**Systems performance documented and accepted**

**System performance sustained**

---

**LINKS**

- Building Cx Guide
- PBS-P100
- PPT
- Professional Services Estimating Tool

**This page applies to:**

- Traditional
- D/B
- D/B-Bridging
- CMc

---

GSA - Public Buildings Service 1.1.2.0.0 Planning Page 29
1.0.0.0.0 Project Management Documents

1.1.1.0.0.b Project Management Plan (PMP)

**PM coordinates PMP development with Project Team**

Incorporate HCAM/TMP

**The PMP provides the overall framework for the project execution. This becomes the communication tool for all stakeholders and establishes customer expectations and draft OA parameters.**

PM publishes PMP, updates as appropriate, and uses as communication tool for team and clients

PMP establishes resources, schedule, and budget

PM leads review and update of PMP, including approvals

Confirm customer expectations, including OA reviews/updates

**PMP defines project delivery method and procurement strategies**

**LINKS**

<table>
<thead>
<tr>
<th>Acquisition Plan FAR Part 7</th>
<th>Building Cx Guide</th>
</tr>
</thead>
<tbody>
<tr>
<td>PMP Examples</td>
<td>PMP Template (PIP)</td>
</tr>
</tbody>
</table>

Feasibility 2.4.1.0.0.0.a

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMC

GSA - Public Buildings Service

Planning Page 30
1.1.1.0.0.0.c Acquisition Plan Program/Project

**Project Team evaluates project needs and discusses project delivery methods**

- Traditional
- CMc
- Design/Build
- Bridging

**Project Team selects delivery method**

- A/E
- CMa
- CxA

- GC
- CMc
- Design/Build
- Bridging

**CO prepares draft AQP for inclusion in draft PMP**

AQP will be approved prior to any procurement actions. SSPs will be required for each procurement.

---

**LINKS**

- Acquisition Plan
- Acquisition Plan FAR Part 7
- DEP&P
- PMP/Acquisition Plan Outline Combined
- Sample SSP

---

**This page applies to:**

- Traditional
- D/B
- D/B-Bridging
- CMc
RECAP – CAPITAL CONSTRUCTION PROCUREMENTS
Apply Source Selection Procurement Procedures
Project Delivery Methods Are Highlighted as Follows:

<table>
<thead>
<tr>
<th>A/E Source Selection</th>
<th>General Contractor</th>
<th>Construction Contractor</th>
<th>Construction Contractor</th>
<th>Construction Contractor</th>
</tr>
</thead>
<tbody>
<tr>
<td>6.2.0.0.0.0</td>
<td>6.10.0.0.0.0</td>
<td>6.10.0.0.0.0</td>
<td>6.10.0.0.0.0</td>
<td>6.10.0.0.0.0</td>
</tr>
</tbody>
</table>

Project Team will determine if SS will be Two-Stage, Two-Stage Plus Design Charrette or Three-Stage with a Design Competition.

GC should be on board during Concept development by A/E for maximum benefit to GSA.

GC should be on board during Concept development by A/E for maximum benefit to GSA.

D/B hires A/E

Project Team will determine when the D/B-B CC and their A/E are on board to maximize bridging benefits from Design A/E to D/B A/E.

Concept Design services of the A/E will be obtained by SSP. The level of DD will be determined by the Project Team based on the needs of the project.

The D/B portion of this procurement will require extensive preparation of the D/B RFPs.

The level of services provided by each contractor will be determined by the Project Team as they refine the pertinent SOWs.

The CMa shall be on contract concurrently with the Design A/E to maximize their input in the early stages of design.

The professional services obtained through these contracts are required to insure quality, constructability and to manage budget, scope and schedule.

Acquisition Plan 1.1.1.0.0.0.c

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc

GSA - Public Buildings Service 1.1.1.0.0.0.d Planning Page 32
REQUIRED PROFESSIONAL SERVICES FOR CAPITAL CONSTRUCTION PROJECTS:

**Construction Manager as Agent (CMa)**
- Concurrent with A/E selection
  - 6.3.1.0.0.0.a

**Commissioning Agent (CxA)**
- Concurrent with A/E selection
  - 6.3.1.0.0.0.b

**Art-in-Architecture (AiA)**
- Design Task Order concurrent with A/E NTP
  - 6.1.0.0.0.0.b
- AIA Concept Design
  - 6.7.14.0.1.0
- AIA Fabrication Task Order
  - 7.1.4.0.0.0
- AIA Deliverable
  - 7.1.12.0.0.0

**Other Specialty Consultants**
- Project Team determines the need and timing
  - 6.1.0.0.0.0.a

Project Team determines SOW required from the CMa and the level of services required in each Phase: Design Concepts, DDs, CDs, Construction Administration, through Start-up and Turnover.

Project Team determines the level of Cx desired (considering timing of project and budget constraints). A complete Cx Plan is required for FY 2007 Design Starts.

The process is outlined in the Guide for AIA OCA Program managers are available on this sensitive program.

Procurement procedures apply. Specialty Consultants may be a separate contract or a part of other services provided byCMa, CMc, GC/CC.

Project Team determines if Cx is a part of the SOW for the CMa or a separate CxA contract.

---

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc
1.0.0.0.0.0 Project Management Documents

Traditional

1.1.0.0.0.f Procurement Recap

- Planning
- Authorization/Funding
- Site Acquisition
- Design/Build
- Design
- Tenant Occupancy

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc

GSA - Public Buildings Service

Planning Page 34
1.1.3.1.0.0 Initiate Project in PIP

1. Create project in database
2. Utilize PMP template
3. Take information from FS and enter as new project in PIP to coincide with CILP

Portfolio coordinates the submission of project as part of the CILP via the PIP

Refer to annual CILP instructions

LINKS

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc
1.0.0.0.0 Project Management Documents

Traditional

1.1.3.2.0.0 Project Updates in PIP

Project Team identifies who has editing authority

Update at least monthly

Utilize PIP as a major communication tool for Project Team and management

PIP is used by all levels within GSA and outside customers to view project status

Updated PIP

LINKS

Initiate Project in PIP 1.1.3.1.0.0

This page applies to:

Traditional D/B D/B-Bridging CMc
1.0.0.0.0 Project Management Documents

1.1.5.0.0.0 Project Website(s)

Project team evaluates use of ePM software and/or custom Websites

Coordinate training/review with internal and external Project Team members

Coordinate ePM and/or Website with GSA and tenant agency document security requirements

Define and implement ePM/Websites

Evaluate ePM when PMP is developed. Incorporate ePM/Website decision into PMP.

DrCHECKS is available for design review process at no cost to the region. DrCHECKS meets State Department security requirements.

When GC/CC is a part of the Design Team, all parties will interface during design process on ePM. Consider this cost in ePM training/implementation budget.

This is for sensitive but not classified documents

DrCHECKS GSA Document Security Requirements

NISPOM (Classified Documents)

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMC

GSA - Public Buildings Service

1.1.5.0.0.0

Planning Page 37
2.4.4.0.0.0 Project Funding Request
3.4.5.0.0.0 Budget Authorization Act (Congressional Approval)

Region obtains funding, commences formal site
ACQ process and awards
A/E contract

Central Office runs
expert choice
model and prioritizes
projects

Central Office
submits
prospectus to
OMB

OBM passback

This includes House and Senate authorization and
appropriation

OCA hosts
Courthouse
Orientation and
Design Start
Workshops
6.1.1.0.0

OCA issues project
directive

Congress approves
budget for site/design

OMB includes site/
design prospectus in
President's budget

Region submits
allowance request
to Central Office

Central Office reviews
submissions

Regions submit
draft prospectus
based on CILP
requirements

Project may be
resubmitted in a
future FY

Approved

Not approved

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc
1.0.0.0.0 Project Management Documents
Traditional
6.1.1.0.1.0 Courthouse Orientation and Design Start Workshop

OCA issues site and design directive

Regions formally appoint PM (if not previously appointed)

PMs invited to workshops sponsored by the OCA

Present PMP to OCA representatives and GSA peers (PMs)

Participate in roundtable discussion with peers to strengthen project strategies and review PMP based on peer-to-peer discussions

PMs update PMP as needed

PM assembles Project Team (Transition is made from ABT)

Project Management Documents
6.1.1.0.1.0 Courthouse Orientation and Design Start Workshop

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc

GSA - Public Buildings Service
Planning Page 39
2.0.0.0.0 Planning
Traditional

2.5.0.0.0 Program Development Study (PDS)

Project Team formalizes strategy to complete PDS

Assess supporting documents

Implement PDS procurement strategy

Regional PT prepares draft construction prospectus

Does timing allow use of DE A/E?

Yes

Develop PDS SOW

Select and award PDS contract

Continue stakeholder discussions

Update program goals

Conduct design programming

No

Use Project Consultant Task Order 6.1.0.0.0.0.a

Complete PDS

Update cost estimates

Review security threat and risk analysis

Incorporate additional site and environmental findings

Update design directives

If R&A: Verify and revise feasibility study estimate. Create uniform-Level III by Shell and TI.

If New Construction: Review and update benchmarks.

Evaluate budget. This is the last opportunity to ensure correct funding for project.

LINKS

Project Planning Guide (PPG)
Project Coordination 1.1.0.0.0.0.a

Pre-Project (Preliminary) Planning 2.1.0.0.1
Feasibility 2.4.1.0.0.0.a

This page applies to:

☑ Traditional ☐ D/B ☑ D/B-Bridging ☑ CMC
3.0.0.0.0 Authorization/Funding

3.4.0.0.0 Construction Authorization (Prospectus)

Regions submit draft construction prospectus based on CILP requirements

Central Office reviews and prioritizes submissions

Central Office submits prospectus to OMB

Region obtains funding and awards construction contract

Region submits allowance request to Central Office

Central Office obtains funding

OCA hosts construction start workshop

Congress approves construction budget

This includes House and Senate authorization and appropriation

OMB includes construction prospectus in President’s budget

Not approved

Approved

OMB passback

Project to be resubmitted in future FY

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc
Procurements proceed based on the strategies in the PMP and IAW funding guidance and the Site/Design Directives letter.
4.1.0.0.0 Site Selection/Technical Studies: NHPA and NEPA Process (Overview)

Project Team receives site directive from OCA
Project Team confirms roles and responsibilities
Project Team reviews site selection criteria and timeline for tasks to be completed

Concurrent

Site Investigation

RHPO formalizes consultation with SHPO. RHPO updates the Project Team as historic preservation issues are identified.
If mitigating measures are required in design or construction, the RHPO will continue to monitor the project

NEPA

Regional NEPA Coordinator proceeds on ESA
Regional NEPA Coordinator updates site selection and Project Team as NEPA issues arise

Concurrent

Design documents reflect mitigating measures for NHPA or NEPA as appropriate

Monitor MOA/PAs and mitigation throughout project delivery. This is an ongoing rather than an ending process.

Site Selection includes complex compliance issues to include but not be limited to EOs, NEPA, NHPA, Due Diligence, NAGPRA, CERCLA, et al. Special technical studies are typically required for site evaluation/cost impacts. Project Team must rely upon regional/national specialists to address this complex process.
A process overview of Site, NHPA, Due Diligence, NEPA, et al., may be found in the Library of PM Guide

Construction Award cannot occur without clear title to site

Monitor MOA/PAs and mitigation throughout project delivery. This is an ongoing process rather than an ending process.

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMC

GSA Guidebook I – Acquisition of Real Property

Relocation Planning 2.6.0.0.0.0

Links
6.0.0.0.0 Design

Traditional

6.2.0.0.0 A/E Procurement (Overview)

1.0.0.0.0 Project Management Documents
2.0.0.0.0 Planning
3.0.0.0.0 Authorization/Funding
4.0.0.0.0 Site Acquisition
5.0.0.0.0 Design/Build
6.0.0.0.0 Design
6.2.0.0.0 A/E Procurement (Overview)
7.0.0.0.0 Construction
8.0.0.0.0 Tenant Occupancy

OCA issues Site and Design Directive

Develop A/E SOW 6.2.1.0.0.0.a

Prepare Source Selection Plan 6.4.2.0.0.0

Issue RFQ

Complete Contract Evaluation

Use Project Consultant Task Order 6.1.0.0.0.0.a

LINKS

FS PDS PMP Reference

A/E Source Selection/ Evaluation Process 6.2.2.0.0.0

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc

GSA - Public Buildings Service 6.2.0.0.0 Design Page 4
6.0.0.0.0 Design

Traditional

6.2.1.0.0.0.a A/E Services Scope of Work (Overview)

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
3.0.0.0.0.0 Authorization/Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design/Build
6.0.0.0.0.0 Design

6.2.1.0.0.0.a A/E Services Scope of Work (Overview)

7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy

---

**Links**

- A/E SOW
- DEP&P
- HVAC Excellence
- LEED
- PBS-P100
- Pricing Implementation for Project Management
- Tenant Requirement Guidelines
- WBDG
- Concept Design Partnering Workshop 6.7.2.0.0.0

---

**This page applies to:**

- Traditional
- D/B
- D/B-Bridging
- CMC

---

Source Selection Plan 6.4.2.0.0.0

GSA - Public Buildings Service 6.2.1.0.0.0.a Design Page 5
6.0.0.0.0 Design
Traditional

6.4.2.0.0 Source Selection Plan

Project Team implements A/E Source Selection Strategy approved in PMP

The GSA PM may not be a member of the board.

Two-Stage Selection

OCA issues Site/Design Directives

Project Team commences DE procedures for A/E selection process

The Evaluation Board shall be composed five voting members:

- One highly qualified regional GSA architect or a related regional GSA design professional.
- One highly qualified regional GSA engineer.
- One design professional from OCA.
- One private-sector design professional chosen from the GSA National Register of Peer Professionals by the OCA Center for DE and the Arts.
- One customer representative with both design and procurement expertise.

Two advisors

One from GSA.
One from the customer (in the case of courthouses, the customer representative should be from the National Administrative Office of the Courts or the AO’s representative) – may participate in the review of submission materials and observe Stage II interviews. The advisors may not be present during the A/E Evaluation Board’s deliberations or voting.

A/E Evaluation Board develops Selection Criteria and Evaluation Methodology

A/E Evaluation Board prepares the SSP in concert with the Project Team

SSA appoints A/E Evaluation Board with OCA approval

SSA approves the SSP

Coordinate with CO, OCA and Legal

GSA - Public Buildings Service

A/E Source Selection/ Evaluation Process

Traditional

D/B

D/B-Bridging

CMc

Acquisition Plan

DEP&P

FAR

GSAM

PIP template for PMP

PMP Examples

Samples of Selection Plans

This page applies to:
6.0.0.0.0 Design

Traditional

6.2.1.0.0.0.b Design Charrette (Optional)

---

**Design Excellence Policies and Procedures recommends the following criteria and percentages:**

<table>
<thead>
<tr>
<th>Phase</th>
<th>Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phase I</td>
<td>35% - Design Firm - past performance&lt;br&gt;25% - Lead Designer's philosophy and design layout&lt;br&gt;25% - Lead Designer's portfolio&lt;br&gt;15% - Lead Designer's profile</td>
</tr>
<tr>
<td>Phase II</td>
<td>50% - Team design performance&lt;br&gt;30% - Team organization and management&lt;br&gt;15% - Professional qualifications&lt;br&gt;5% - Geographic location</td>
</tr>
</tbody>
</table>

---

Project Team conducts Design Charrette (12-hr competition) as detailed in PMP

Issue Task Order for Professional Advisor to manage the Design Charrette

One member is appointed to serve as Chair. If utilizing the Design Charrette, a Professional Advisor is hired to organize the charrette.

OCA appoints private-sector professional from National Register of Peer Professionals

Conduct Phase II interviews and Design Charrette as detailed in PMP

GSA PM may NOT be a voting member of the A/E Selection Board

---

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc

Source Selection Plan 6.4.2.0.0.0

Project Management Documents

Authorization/Funding

Site Acquisition

Design/Build

Design

Design Charrette (Optional)

Construction

Tenant Occupancy

---

GSA - Public Buildings Service 6.2.1.0.0.0.b Design Page 7
6.0.0.0.0 Design

Traditional

6.2.1.0.0.0.c Design Competition

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
3.0.0.0.0.0 Authorization/Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design/Build
6.0.0.0.0.0 Design
6.2.1.0.0.0.c Design Competition
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy

Project Team conducts a Design Competition IAW DEP&P

Shortlisting of Most Qualified Lead Designer-A/E Firms by A/E Evaluation Board for Participation in Stage III Vision Competition

Coordinate Planning with OCA and Competition Advisor and Hold Vision Competition

Blind Evaluation of Vision Competition by Independent Jury of National Peers

Presentation of the Jury Ranking and Report to the A/E Evaluation Board by Jury Chair and Charrette Advisor

Ranking of Lead Designer-A/E Teams by A/E Evaluation Board Incorporating Vision Competition Ranking

Recommendations to the GSA Regional Selection Authority by the A/E Evaluation Board

Final Selection by the GSA Regional Selection Authority

LINKS

DEP&P

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc

GSA - Public Buildings Service 6.2.1.0.0.0.c Design Page 8
6.2.2.0.0.0, 6.2.4.0.0.0, and 6.2.5.0.0.0 A/E Source Selection/Evaluation Process

Has the Project Team elected to hold a Design Charrette or Competition?

Yes

- Project Team conducts a Design Charrette 6.2.1.0.0.0.b

No

- Design Competition 6.2.1.0.0.0.c

Or

- A/E Board makes final ranking and recommendations to the GSA selection authority

Negotiations begin with the selected firm for the A/E contract

A/E Board receives portfolio submissions by design firms and lead designers

A/E Evaluation Board evaluates and selects a “short list”

Short-listed firms assemble complete A/E design teams and submit SF 254/255

A/E Selection Board evaluates SF 254/255 submittals and interviews design teams

A/E Evaluation Board ranks A/E teams based on evaluation criteria

Schedule Interviews with short-listed A/E firms

Receive Phase II submissions

Project Team receives approved SSP and commences A/E selection

Prepare and clear CBD and design magazine announcements with approval by region/OCA

Advertise for Design Architect – Bridging Design Services

**LINKS**

- A/E Advertisement
- A/E Evaluation Board Report
- Acquisition Plan
- DEP&P
- FAR
- GSAM
- Notification Letters to A/E Firms
- PMP Reference
- Sample SSP
- A/E Procurement (Overview)

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMC

GSA - Public Buildings Service

6.2.2.0.0.0

Design Page 9
6.0.0.0.0 Design

Traditional

6.2.6.0.0 A/E Contract for Design

GSA Project Team meets with A/E to review project goals and objectives

GSA issues initial SOW to A/E

Meet with A/E to review SOW

Revise SOW

Update government fee estimate

Request proposal

Receive and review proposal

Prepare technical evaluation including PNP

PM/CO conduct negotiation with A/E

Prepare PNM

Finalize contract, including SOW, clauses, schedule, etc.

Award A/E contract and compile contract file

AiA Contract 6.1.0.0.0.0.b

SOW includes schedule, historic preservation plans, handbooks, tenant requirements and contract clauses

If GSA cannot reach agreement on SOW and/or A/E fees with the #1 firm, GSA may terminate negotiations. GSA may then open negotiations with the #2 firm.

Request audit for salary rates and OH

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc

Links

Sample PNM
Sample PNP
A/E Procurement (Overview) 6.2.0.0.0
CMa must be on contract concurrent with Design A/E to maximize their input early in the Design Concepts and DDs. This would apply to CMc.
6.0.0.0.0 Design
Traditional

6.3.1.0.0.b CxA Scope of Work (if apart from CMa)

Project Team confirms project goals and objectives with all stakeholders.

Review prospectus, feasibility study, BER, etc.

Confirm construction budgets

Review Building Cx Guide

Finalize SOW

The Project Team evolves over the life of the project. As contractors (A/E, CMa, CMc, Cx, GC/CC) and special consultants are hired, they become a part of the Project Team.

Project Team reviews PMP strategy and required Cx services.

Project Team prepares draft SOW and seeks comments from all members and stakeholders.

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc
The Project Team evolves over the life of the project. As contractors (A/E, CMa, CMc, Cx, GC/CC) and special consultants are hired, they become a part of the Project Team.

CMa must be on contract concurrent with Design A/E to maximize their input early in the Design Concepts and DDs. This would apply to CMc.

When the decision has been made to use existing contracts such as IDIQ, the SSP may not be necessary.
6.1.0.0.0.0.b Art-in-Architecture Contract

Establish introductory meeting

Conduct introductory meeting to review project objectives and artist selection process

Solicit for artists (request for interest)

Panel receives and reviews artist slides and resumes

Panel prepares short list of artists for OCA

OCA representative and RFAO evaluate artists and prepare recommendation

Review recommendation/artist with RA

Revise and issue final contract

Discuss contract with artist and negotiate changes to deliverables; price is firm fixed

Issue draft contract

RFAO writes draft SOW/contract clauses, establishes schedule, determines commission price

Commissioner approves artist selection

Forward recommendation letter to OCA and Program Manager

Write recommendation letter for RA signature

Acceptable?

LINKS

Fine Arts Desk Guide

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc
A/E incorporates VE, develops final presentation

Conduct regional presentation

Concept Design Review Comments 6.7.6.3.0.0

Prepare final concept submission

Submit for OCA IGE

Review final concept submission

A/E incorporates review comments

Conduct presentation to Commissioner 6.7.14.0.0.0

OCA prepares Commissioner’s final concept approval memorandum

Issue NTP for DD phase

Validate funding sources

Verify budget compliance by performing IGE

Final concept(s) submission is a formal milestone requirement in the A/E SOW for capital projects

The OCA review is concurrent with the final concept review

Review comments are submitted from all interested stakeholders. A/E will either incorporate the review comments or indicate to the GSA PM another disposition along with their rationale.
Partnering workshop is an opportunity to introduce all stakeholders and the project team, establish a partnering statement and charter. Each party has an opportunity to state their goals for the project.

Goal is to create a signed charter and schedule any follow-up sessions for team building and partnering.
Design Charrette may also be used to address project-specific issues: security, site configuration impacts to building mass, etc.

Level of effort must be addressed in developing the A/E SOW.

Project Team will determine the type and level of effort required of the A/E in Concept Design. Refer to the PMP for project needs.

1.1.1.0.0.b

Design Charrette, in this context, will be utilized to develop preliminary concepts.

OCA is available to assist. Contact the Program Coordinator to provide technical assistance, programmatic specialists, etc.

Project Team will prescribe the desired outcomes from a specific Design Charrette.

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc

GSA - Public Buildings Service

Design Excellence Peer Review 6.7.7.0.0

Design Page 19
At least three distinctly different concepts will be submitted by the A/E team.

The audience for this presentation will vary depending on regional requirements. The A/E is responsible for the general presentation and for responding to any follow-up questions resulting from the presentation.

A/E design team presents three preliminary concepts to the technical review team, Project Team and peers.

DE Peer Review is conducted on the three concepts. Peers provide review comments.

Peer review committee will recommend development of one concept or development of a totally new concept incorporating portions of the three concepts.

A/E will develop and present the final concept to the Peer Review Committee.

OCA will recommend the final concept.

Initiate contact with OCA to set up peer review approximately 6 to 8 weeks in advance of presentation.

Potential for multiple peer reviews.

Initiate contact with OCA to set up second peer review approximately 6 to 8 weeks in advance of presentation.

LINKS

- A/E SOW
- Concept Design
- Partnering Workshop
- 6.7.2.0.0.0

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc

GSA - Public Buildings Service

6.7.7.0.0.0

Design Page 20
6.7.6.3.0.0 Concept Design Review Comments Including Concept Design Selection and 6.7.9.0.0.0 VE Workshop

A/E prepares/distributes interim submission

Project Team reviews submissions and submits comments

A/E responds to review comments

A/E incorporates review comments into next submission

Project Team selects final Concept Design

Project Team hosts VE workshop on selected Design Concept applying VE and LCC best practices detailed in PBS-P100

The number and percent of concept document completion levels (e.g. 15%, 30%, 50%, etc.), content/format, and schedule of interim submissions will vary depending on the complexity of the project. This should be defined in the A/E Scope and the PM's overall execution schedule. These early submissions will include those items in PBS-P100 such as mass models, site layouts, blocking, and stacking.

Review for compliance with the program requirements, scope, and PBS-P100

The review comments are submitted from all interested stakeholders. The A/E will either incorporate the review comments or respond appropriately.

On-board reviews are usually informal and discretionary. They are conducted to check the progress status of various disciplines. Attendees will vary depending upon issues to be reviewed. Separate breakout sessions by discipline, e.g., fire protection, mechanical, electrical, architectural, may be effective.

Project Team may include GC if they are on board

LINKS

A/E SOW  DEP&P  Design Review Checklist

DrCHECKS  PBS-P100 - Appendix  Submission Checklist

Concept Design Partnering Workshop 6.7.2.0.0.0

This page applies to:  ✔ Traditional  ✔ D/B  ✔ D/B-Bridging  ✔ CMc
Community outreach is an ongoing process. The design A/E firm may take the lead on some of these efforts, while the PM may be instrumental in arranging meetings with these groups and other GSA consultants.

Coordinate timing to regional policies

Project Team coordinates the design effort with local planning, zoning, transportation and interest groups.
6.7.14.0.0.0 Design

Traditional

6.7.14.0.0.0 Final Concept Presentation to the Commissioner

6.7.15.0.0.0 Final Concept Approval Memorandum

Contact OCA to arrange a scheduled date for this presentation after final concept is selected.

OCA issues Task Order for IGE.

The Concept Design will be forwarded to OCA for development of IGE.

OCA will review and comment within 10 working days.

Reconciliation of IGE and A/E estimate.

Is project within budget?

No → Redesign to budget

Yes → Schedule presentation to Commissioner

Coordinate meeting logistics

A/E and PM conduct presentation

OCA prepares Commissioner final concept approval memorandum

Issue NTP for DD phase

Preferred: include the presentation of the AIA 6.7.14.0.1.0

Have the team review the layout of the presentation room to coordinate the presentation with the room’s physical constraints. Work out logistics for project model and audio-visual delivery. Verify the list of attendees with OCA. Include all important stakeholders.

LINKS

PBS-P100 Concept Design
Partnering Workshop 6.7.2.0.0

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc
6.0.0.0.0 Design

Traditional

6.7.14.0.1.0 Art-in-Architecture Concept Design

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
3.0.0.0.0.0 Authorization/ Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design/Build
6.0.0.0.0.0 Design
6.7.14.0.1.0 Art-in-

Architecture Concept Design
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc
6.0.0.0.0 Design

6.8.0.0.0 Design Development (Overview)

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
3.0.0.0.0.0 Authorization/Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design/Build
6.0.0.0.0.0 Design Development (Overview)
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy

1.0.0.0.0.0 Project Management
2.0.0.0.0.0 Planning
3.0.0.0.0.0 Authorization/Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design/Build
6.0.0.0.0.0 Design Development (Overview)
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc

Design Development Process
6.8.0.0.0.1

Utility Rebate Program Review
6.8.0.0.0.2

DD Program Review Workshop
6.8.1.0.0.0

DD Systems Selection Analyses
6.8.2.0.0.0

DD Interdisciplinary Coordination Review

National CAD/DIFM Standards Compliance Review

DD Submission (35%)
6.8.5.0.0.0

Construction Strategy/Phasing Plan
6.8.9.0.0.0

Independent OCA PBS-P100 Review and IGE
6.8.11.0.0.0
6.8.0.0.0.0 Design Development (Process)

6.8.0.0.1 Design Development (Process)

Conduct DD Program Review Workshop (optional) 6.8.1.0.0.0

Review Tenant Telecommunication Requirements

Prepare/ Distribute Interim DD Submission(s) 6.8.5.0.0.0

Verify budget compliance by performing IGE

Conduct interim submission(s) review

Conduct National CAD/ CIFM Standards Completeness Review

Is another interim submission required?

Interdisciplinary Coordination Review

System Selection and LCC Analyses 6.8.2.0.0.0

Issue comments to architect

Owner’s/Code/ Constructability Staff Reviews

Prepare final DD submission

Conduct OCA Review 6.8.11.0.0.0

Prepare Construction Strategy Phase Plan DD 6.8.9.0.0.0

Conduct IGE as necessary for the submission, verify budget compliance

Follow a loop similar to the loop from above for final design submission

DD VE Workshop carries great emphasis. Focus is now on detailed aspects of earlier decisions made during DD. The Project Team leads this effort to ensure project systems and materials make sense economically and allow quality with durability.

Update IGE

Confirm Tenant Telecommunication Requirements

Confirm pricing policy implementation including document structure for pricing and budget. Collect RWAs, if necessary.

Independent OCA PBS-P100 Review and Estimate 6.8.11.0.0.0

Review TI Status with customer

OA Update 8.1.1.3.0.0

NTP to CD phase

LINKS

National CAD/ CIFM Standards OA Tool

PBS-P100 PDRI

Concept Design (Overview) 6.7.0.0.0.0

This page applies to:

✓ Traditional ✓ D/B ✓ D/B-Bridging ✓ CMc
Query PMs from recently completed projects and determine if and how they were able to participate in local Utility Rebate Programs.

Task the A/E to research your specific locality. Locality issues may be highly influential in GSA’s ability to participate.

Based on the data compiled, the Project Team will be better positioned to make informed business decisions early in DD.
Project Team should review PMP, Cx Plan and status of current programming. PMP strategy may indicate a need for the DD Workshop if certain program parameters are evident.  

1.1.1.0.0.0.b

Is a workshop needed?

Yes

A/E will organize and host the DD Program Review workshop. Check A/E SOW. Outline agenda and determine the deliverables.

No

Verify scope and budget are within the approved prospectus

Utilize the PDRI for a programmatic review. Results of the PDRI may substitute for the workshop or highlight areas in need of further development and definition.

Based on the deliverables from the workshop or tenant meetings, proceed with DDs
6.8.2.0.0 DD Systems Selection Analyses

- A/E defines and sizes base systems and alternatives
- Structural, mechanical, electrical, plumbing, etc.
- A/E performs life cycle cost analysis
- DD Submission for Project Team review
- Project Team makes system selections
- OCA HVAC peer review
- Must be aligned with LEED goals

1.0.0.0.0 Project Management Documents
2.0.0.0.0 Planning
3.0.0.0.0 Authorization/Funding
4.0.0.0.0 Site Acquisition
5.0.0.0.0 Design/Build
6.0.0.0.0 Design
6.8.2.0.0.0 DD Systems Selection Analyses
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy

GSA - Public Buildings Service
6.0.0.0.0 Design

Traditional

6.8.5.0.0 DD Submission (35%)

Project Team will direct the A/E to the Facilities Standards for the Public Buildings Service (PBS-P100) and its Submission Requirements, Appendix A.

Appendix A details the Design Process and Related Submission Requirements for both New Construction and Renovation/Alteration projects.

Project Team must ensure the A/E SOW defines any special requirements in addition to PBS-P100.

D/B and D/B-Bridging will require scope modifications from any “standard” SOWs.

Project Team will schedule each submittal during final negotiations. SOW should be clarified during negotiations to ensure timely delivery of each submission.

A/E will deliver the 35% DD submission as provided in the A/E SOW.
The Project Team will review the PMP, Cx Plan, AQP to see if updates are required for the Construction Procurement Strategy and/or Construction Phasing Plans.

**Does the construction strategy still make good business sense?**

- **No**
  - The Project Team will need to revisit their construction strategy. A brainstorming session with the Project Team, including A/E, CMa, and several COs may be necessary to develop a new procurement strategy.

- **Yes**
  - The PM will need to update the PMP to reflect changes in procurement and phasing strategies.
  - The CO will revise the AQP and obtain the necessary approvals.
  - The PM will need to update the PIP to reflect the current status of construction procurement and phasing plan strategies.

**Links**

- PBS-P100
- PMP 1.1.1.0.0.0.b

**This page applies to:**

- Traditional
- D/B
- D/B-Bridging
- CMc

**GSA - Public Buildings Service** 6.8.9.0.0.0 Design Page 31
The DD Submission (35%) will be forwarded to OCA for an independent PBS-P100 Review. The OCA IGE is optional at this time.

Project Team will ensure the A/E SOW reflects this submission and the appropriate reference to PBS-P100 Appendix A, Submission Requirements

OCA will review and comment within 10 working days

The DD process of meetings and submissions will finalize the selection of all systems with respect to type, size, and other material characteristics

Final approvals will be issued by the PM/CO

IGE not required for D/B (contract price prevails)

Submission requirements vary slightly between New Construction, Modernization, and R&A Projects

No design discipline should start work on CDs until the project directive has been approved.
6.0.0.0.0 Design
Traditional

6.9.0.0.0 Construction Documents

**CO issues NTP to A/E for construction documents**

- **A/E prepares and issues CD Submission (60-75%)** (midpoint)
  - CD submissions, including A/E cost estimates, must be furnished IAW PBS-P100, Appendix A
  - Note: Team may elect to provide some of these services by the CMa or CMc

- **Prepare and Issue CD Submission (Pre-final 90%)**
- **Review and issue comments**
- **A/E to validate and incorporate all review comments into 100% CDs**

- **Independent verification of review comments**
- **CMa/CMc Update Estimate 6.7.12.0.0.0**
- **Prepare PBS CAD Library Submission**
- **OCA performs independent review and optional estimate 6.7.13.0.0.0**

**Finalize/issue construction bid documents**

**OA Update 8.1.1.3.0.0**

**Coordinate with A/E Fabrication and Installation 7.1.4.0.0.0**

**.Verify budget compliance by performing IGE**

**Links**

- National CAD/CIFM Standards
- PBS-P100
- PBS Pricing Desk Guide

**This page applies to:**

- Traditional ✓
- D/B ✓
- D/B-Bridging ✓
- CMc ✓

GSA - Public Buildings Service

6.9.0.0.0

Design Page 33
Project Team determines the need for CD Program Review Workshop

If D/B-B – references to A/E will apply to D/B-B CC, as defined in Bridging Documents (SDW)

These steps would be repeated for 90% CD Program Review Workshop through OCA PBS-P100 Review and IGE

Is the program within scope and budget?

Review PMP 1.1.1.0.0.0.b

Inter- and intradisciplinary coordination must be conducted IAW PBS-100

Comprehensive Review Checklists are available in Appendix A

QAP and Cx may be combined. PMP addresses management of Cx and Quality Controls.

If D/B-B – references to A/E will apply to D/B-B CC, as defined in Bridging Documents (SDW)

CMa and Project Team must reconcile scope and/or budget issues before proceeding

CMa conducts review and IGE

Project Team reviews submission and prepares comments

Project Team evaluates all comments and provides direction to A/E for 90% submittal

Update OAs as needed 8.1.1.3.0.0

Construction Documents 6.9.0.0.0

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
3.0.0.0.0.0 Authorization/Funding
4.0.0.0.0.0 Design/Build
5.0.0.0.0.0 Design
6.0.0.0.0.0 Design
6.9.3.0.0.0 CD Program Review Workshop (CD Start)
6.9.10.0.0.0 CD Program Review Workshop (90%)
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy

6.9.3.0.0.0 CD Program Review Workshop (CD Start)
6.9.10.0.0.0 CD Program Review Workshop (90%)
CMa and Project Team must reconcile scope and/or budget issues before proceeding.

A/E submits 90% CDs with A/E’s cost estimate to Project Team.

Project Team submits 90% CDs and estimate to CMa for review and IGE.

Project Team ensures the required reviews of 90% CDs are conducted as required by PBS-P100.

Is the program within scope and budget?

Yes: Project Team submits 90% CDs to OCA for PBS-P100 Compliance Review.

No: OCA completes IGE to insure project is within budget.

Will OCA order IGE?

Yes: OCA completes IGE.

No: OCA completes compliance review, scope review and IGE.

OCA provides feedback to regions for the 100% CD submission.

If D/B or D/B-B – OCA IGE not required. D/B-B contract prevails.

Update OAs as needed.

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc
6.7.12.0.0.0 CMa’s CD Review/Estimate (100% CDs)

Project Team submits 100% CDs and A/E estimate to CMa for review and IGE.

Is the program within scope and budget?

Yes

Project Team utilizes 100% CDs as the basis for Construction Procurement Documents.

No

A/E prepares and submits 100% CDs as directed by Project Team.

A/E updates checklists as needed.

Project Team ensures any changes requested in previous reviews are included in the 100% CDs.

Construction Officer will proceed with Construction Procurement when funds are authorized.

Update OAs as needed 8.1.1.3.0.0

CxA review as specified in Cx Plan

PBS CAD Library Submission will be submitted by the A/E as directed by the PM/CO.
Construction Procurement

6.10.1.0.0

1.0.0.0.0 Project Management Documents
2.0.0.0.0 Planning
3.0.0.0.0 Authorization/Funding
4.0.0.0.0 Site Acquisition
5.0.0.0.0 Design/Build
6.0.0.0.0 Design
6.4.10.0.0.0 Construction Contract Award (Exercise GMP Option)
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy

Project Team evaluates GC/CC performance to date and reviews procurement strategies in PMP and AQP

GC/CC submits final construction option pricing

Project Team reconciles GC/CC proposal with IGE

Are negotiations required on scope or pricing?

Yes

Project Team develops negotiating strategy

Negotiations are conducted with GC/CC

Is Project Team able to reach an agreement on scope and pricing?

Yes

Project Team requests allowance documents from OCA/PBS Budget Office

Allowance documents are received by Project Team

Exercise GMP option for construction and publish Award Announcement

GMP may be converted to firm-fixed price at any time during construction

Initiate security clearance process for CC personnel

CO requests bonds and insurance

Project Team receives, reviews, and approves submittals

Project Team reviews PMP and AQP to confirm strategy and timing for NTP

CO prepares to issue NTP

No

Redesign or commence SS for new GC/CC

Links

- Acquisition Plan
- PMP Reference

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc

GSA - Public Buildings Service

6.4.10.0.0.0

Design Page 37
The contract documents can be conformed with all amendments as deemed appropriate

If GC/CC is providing Design and Constructability Reviews, the NTP will be issued to GC/CC for Design and Constructability Reviews. The GMP option for construction (NTP) will be exercised at a later date, as determined by Project Team and detailed in PMP and AQP.
This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc

GSA - Public Buildings Service 7.0.0.0.0

GC/CC – GC – refers to General Contractor under the Traditional Delivery Methods and CC – refers to Construction Contractor under all other delivery methods.
6.10.0.0.0 Construction Procurement

- GC/CC Source Selection Plan
- Advertisement for Construction Services
- Pre-Proposal Conference
- Proposal Document Addenda
- GC/CC Selection Evaluation Factors (Phase I)
- GC/CC Evaluations/Selection (Phase I)
- GC/CC Submissions (Phase II)
- GC/CC Evaluations/Selection (Phase II)
- Construction Contract Award and Pre-NTP Documents (Bonds, Insurance, Security, etc.)
- Construction Document (if D/B-B)
- Professional Services Task Orders (Construction)
- AIA Fabrication Task Order

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc

GC/CC – GC refers to General Contractor under the Traditional Delivery Method and CC refers to Construction Contractor under all other delivery methods.
**6.10.1.0.0 GC/CC Source Selection Plan**

1. Project Team reviews AQP and PMP
2. Establish SSEB
3. Develop SSP Criteria
4. SSEB reviews and SSA approves SSP
5. Is it approved?
   - Yes: Issue SSP
   - No: Revise and resubmit

**GC/CC Evaluation Factors**
- (Phase I) 6.10.1.1.0.0
- (Phase II) 6.10.13.0.0.0

**Prepares/updates AQP as needed**

**Recommendations:** GSA and customer as voting members. A/E and CM as technical advisors.

---

**GC/CC – GC – refers to General Contractor under the Traditional Delivery Methods and CC – refers to Construction Contractor under all other delivery methods.**

---

**LINKS**
- FAR
- GSAM
- Sample SSP
- Source Selection Guide
- Pre-Proposal Conference 6.10.4.0.0.0

---

**This page applies to:**
- Traditional
- D/B
- D/B-Bridging
- CMc
6.10.2.0.0.0 Advertisement for Construction Services

CO develops and issues FED BIZ OPS advertisement

Market project to prospective contractors

Coordinate solicitation/RFP distribution following GSA document security policy

Announce date, place, and time for Pre-Proposal Conference

Project Team reviews Acquisitions Plan, SSP and PMP
7.0.0.0.0 Construction

Traditional

6.10.4.0.0 Pre-Proposal Conference

Project Team determines:
date, place and time
for Pre-Proposal Conference

CO sets up SBA
networking processes

CMa sets up site
tour(s) (if applicable)

PM/CO develops agenda

PM/CO conducts meeting and tour

CMa provides minutes/sign-in sheet
to all attendees

Is another Pre-Proposal Conference necessary?

Yes

No

Proceed with Proposal Document Addenda

6.10.11.0.0.0

Concurrent Activities

Project Management Documents
Authorization/Funding
Site Acquisition
Design/Build
Design
CMc
D/B
D/B-Bridging
CMc
This page applies to:

Traditional

Proposal Document Addenda

6.10.11.0.0.0
6.10.11.0.0 Proposal Document Addenda

- Project Team receives clarification comments
- Develop response including narrative sketches, specifications, etc.
- CO revises proposal due date if necessary
- CO assembles addenda
- Coordinate addenda distribution of hard copies following GSA document security policy
- Issue/post addenda to FED BIZ OPS

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc

LINKS

- FAR
- GSAM
6.10.1.1.0.0 GC/CC Selection Evaluation Factors (Phase I)
6.10.8.0.0.0 GC/CC Evaluations/Selection (Phase I)

Receive Phase I proposal

SSEB independently evaluates Phase I proposals

SSEB develops consensus ranking and issue report

CO notify offerors

Without price you may notify offerors of their standing relative to the advisory short list, but firms can’t be excluded from Phase II if prices have not been evaluated.
receive phase ii submissions including price proposals

sseb independently evaluates phase ii proposals

develop a competitive range

interview those in the competitive range

sseb determines final consensus scores and ranking

sseb chairman drafts final report and issues to ssa for approval

are price proposals within available funds?

yes

notify offerors

no

update oa prior to award

offerors within the competitive range submit bafo

implement strategy

develop negotiation strategy
6.10.16.0.0.0 Professional Services Task Orders (Construction)

Determine professional services needed for construction administration

Examples: IH, various testing, utility services, move coordination, etc.

Exercise A/E/CM options and new contracts as necessary
Traditional

7.1.4.0.0 Art-in-Architecture Fabrication Task Order

1.0.0.0.0 Project Management Documents
2.0.0.0.0 Planning
3.0.0.0.0 Authorization/Funding
4.0.0.0.0 Site Acquisition
5.0.0.0.0 Design/Build
6.0.0.0.0 Design
7.0.0.0.0 Construction
7.1.4.0.0 Art-in-Architecture Fabrication Task Order
8.0.0.0.0 Tenant Occupancy

**Project Team coordinates meeting with commissioned artist, A/E and GC to discuss approved project schedule and proper timing for fabrication and installation of the artwork**

**Fabrication Task Order is issued based upon these discussions**

**RFAO will coordinate with the artist and keep Project Team advised of any issues on budget or schedule**

**LINKS**

1. Project Management Documents
2. Planning
3. Authorization/Funding
4. Site Acquisition
5. Design/Build
6. Design
7. Construction
7.1.4.0.0 Art-in-Architecture Fabrication Task Order
8. Tenant Occupancy

**This page applies to:**

- Traditional
- D/B
- D/B-Bridging
- CMc

GSA - Public Buildings Service

7.1.4.0.0.0

Construction Page 10
This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc

GSA - Public Buildings Service 7.1.0.0.0

Construction Page 11

Notice to Proceed
7.1.1.0.0.0

Construction Kick-off Meeting
7.1.2.0.0.0

Partnering Session
7.1.3.0.0.0.a

Groundbreaking/ Construction Start
7.1.5.0.0.0

Construction Administration (Overview)
7.1.6.0.0.0.b

Construction Excellence Peer Review (1st Review)
7.1.8.0.0.0

Follow-up Partnering Session

Substantial Completion Certification
7.1.15.0.0.0.a

Occupancy Permit
7.1.16.0.0.0

Final Inspections
7.1.14.1.0.0.a

Turnover Documents
7.1.14.0.0.0

Additional Phases Delivery (TI, Phases, Annexes)
7.1.13.0.0.0

AiA Deliverable
7.1.12.0.0.0

Construction Excellence Peer Review (2nd Review)

Some processes may be concurrent

Construction may start during any design phase at discretion of Project Team

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc
7.0.0.0.0 Construction

7.1.1.0.0.0 Notice To Proceed

CO issues NTP

Project team reviews the benefits of holding partnering concurrently with kick-off or delaying until after kick-off 7.1.3.0.0.0.b

Determine best option

Concurrent Meetings

Conduct Construction Kick-off Meeting 7.1.2.0.0.0

Conduct Partnering Session 7.1.3.0.0.0.a

Project Team provides feedback from Kick-off Meeting and Partnering Session. Update PIP and set Communications Plan into motion as detailed in PMP.

Conduct Construction Kick-off Meeting 7.1.2.0.0.0

Conduct Partnering Session 7.1.3.0.0.0.a

Include partnering and construction kick-off information in NTP letter
7.1.2.0.0.0 Construction

Traditional

7.1.2.0.0.0 Construction Kick-off Meeting

Project Team develops agenda

Conduct meeting

CMa issues meeting minutes

Discuss Pros/Cons of Concurrent Kick-off and Partnering Meetings 7.1.3.0.0.0.a

The Project Team evolves over the life of the project. As contractors (A/E, CMa, CMc, Cx, GC/CC) and special consultants are hired, they become part of the Project Team.

Project Team assigns roles/responsibilities in the PMP. Most teams will utilize their CMa for meeting coordination, recordation, action plans.
The Project Team evolves over the life of the project. As contractors (A/E, CMa, CMc, Cx, GC/CC) and special consultants are hired, they become a part of the Project Team.
Option A: Holding partnering concurrently with kick-off:

**Pros:**
- Enhances team building.
- Captures the early enthusiasm for a new project.
- Logistics and scheduling are simplified with one meeting.

**Cons:**
- Duration and intensity could tire stakeholders and team members; information overload.
- Agenda is more generic in format than actual, as construction has not started yet.

Option B: Delaying partnering until after kick-off:

**Pros:**
- Real construction issues can be addressed.
- Real relationship issues can be addressed.
- Can determine if communications and processes established at the Kick-off Meeting are working correctly.

**Cons:**
- Logistics in scheduling: not being able to assemble all the stakeholders at the same time.
- Kick-off enthusiasm has waned.
- Personality conflicts may have already arisen and may be causing problems.
- Project has already begun, which may make it difficult for project staff to break away from the site and attend the meeting.

A/E Meeting: Discuss with the A/E team planning trigger for whether the team feels an outside consultant for the Partnering Meeting is necessary.
7.0.0.0.0 Construction

Traditional

7.1.5.0.0.0 Groundbreaking/Construction Start

- Consult with Office of Customer Service: Is groundbreaking needed?
  - Yes: Determine stakeholders and local dignitaries to invite to ceremony
  - No: Go to Construction Administration 7.1.6.0.0.0.a

- Determine date of groundbreaking
- Coordinate logistics
- Have ceremony

Logistics: Public Relations Considerations (Press Releases, Media Contacts) and Vendors (Security, Canopies, Food, Sound Equipment, Flags [County, US, State?], Podiums, Ceremonial Shovels, Entertainment)
7.0.0.0.0 Construction
Traditional

7.1.6.0.0.0.a Construction Administration

- Construction Administration (Overview) 7.1.6.0.0.0.b
- Construction Administration: Safety 7.1.6.0.0.1.a
- Construction Administration: Project Cost Management 7.1.6.0.0.1.b
- Request for Information (RFI) 7.1.6.0.0.1.c
- Construction Schedules 7.1.6.2.0.0
- Submittal Schedule/Log/Submissions 7.1.6.4.0.0
- Quality Control Plan 7.1.2.0.1.2
- Inspections and Testing Schedule 7.1.6.5.0.0
- Special Testing/Mock-up Plans/Reports 7.1.6.6.0.0
- Additional Phases Delivery (T1, Phases, Annexes) 7.1.13.0.0.0
- AIA Deliverable 7.1.12.0.0.0
- Construction Excellence Peer Review (2nd Review) 7.1.8.0.0.0
- Construction Excellence Peer Review (1st Review) 7.1.8.0.0.0
- Follow-up Partnering Session 7.1.10.0.0.0
- CII Benchmarking 7.1.7.0.0.0
- GC/CC Evaluations (NIH) 7.1.9.0.0.0
- GC/CC Contract Modifications 7.1.6.8.0.0
- Project Web-cam 7.1.6.1.1.1

Some processes may be concurrent.
Project Team will assign roles and responsibilities for the project. Some of the following tasks may be performed by CMA/CxA as identified in respective SOW.

All of these processes are concurrent.

- Project Team reviews and approves construction schedules 7.1.6.2.0.0
- GC/CC prepares submittal schedule, Log and Submissions 7.1.6.4.0.0
- GC/CC coordinates testing schedule law contract 7.1.6.5.0.0
- CMA prepares and monitors QA Plan 7.1.2.0.1.2
- CMA/CxA conducts or prepares inspection schedule/reports 7.1.6.5.0.0
- PM/CO coordinate and manage contract modifications 7.1.6.8.0.0
- CMA prepares special testing/mockup plans/reports
- Project Team establishes system and monitors RFIs 7.1.6.0.0.1.c
- CO processes progress payments law contract specifications and approved schedule
- PM/CO evaluate contractor (NIH) (annually or as deemed appropriate) 7.1.9.0.0.0

Project Team conducts regularly scheduled “progress” meetings. Project updates are provided by disciplines as needed. Special meetings may be called at the discretion of the Project Team.

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc
7.1.6.0.0.0.0 Construction

Traditional

7.1.6.0.0.1.a Construction Administration: Safety

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMC

Project Team reviews project-specific Safety Management Plan

Accept plan?

Yes

Project Team implements and monitors safety plan

No

Provide feedback to contractor

Project Team receives reports
The project budget is established early on in the planning phase and addressed in the PMP. The firewall between Shell and TI budgets is established in the FS and confirmed in the PDS. The project budget should be updated throughout the project duration as events dictate.
7.1.6.0.0.1.c Requests for Information (RFI)

**Flowchart Description:**

1. **Project Team develops process to manage RFIs**
2. **Contractor submits requests for information to the A/E, CMa**
3. **CMa prepares log and tracks the RFI**
4. **Responsible party reviews and responds**
   - Yes: **Contractor reviews response**
     - If response requires change order:
       - **GC/CC Contract Modifications 7.1.6.8.0.0**
       - What are the budget and schedule implications of the contract modifications?
     - No: **GC/CC implements response**
   - No: **Respond to contractor**

**Notes:**
- RFI process will be adjusted to meet project needs and may be different for D/B.
- A/E, CMa, or ePM depending on the chosen process by Project Team.
- A/E, CMa, GSA, or customer depending on responsible party.
GC/CC contractor submits preliminary CPM schedule

Provide feedback to GC/CC

Review schedule

Is preliminary schedule accepted?

Yes

GC/CC submits baseline schedule

Project Team reviews baseline schedule

Is baseline schedule approved?

Yes

Project Team establishes process for monthly CPM schedule updates and approvals

Construction payments must be based on monthly CPM schedule reviews and approvals. PM/CO will certify payments within the established process.

Update PIP with current payment and schedule information

PM/CO will note any special provisions for off-site stored materials

The preliminary and baseline schedules are reviewed by a GSA, CMa, and/or outside scheduling consultant

Cost loaded schedule must be approved as provided in CPM examples

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc

LINKS

CPM Examples

Project Updates in PIP 1.1.3.2.0.0
GC/CC contractor prepares and delivers submittal schedule

Is submittal schedule accepted?

Yes

Project Team establishes process to track submittals

Manage and update submittal log via monthly/weekly scheduled meetings

No

Provide feedback to contractor

Review submittal schedule

Schedule reviewed by A/E, GSA, and CMa

Refer to specifications for submission requirements

7.0.0.0.0 Construction

7.1.6.4.0.0 Submittal Schedule/Log/Submissions

This page applies to:

Traditional D/B D/B-Bridging CMc
GC/CC submits project specific QAQC Plan including inspection and report schedules

GSA, A/E, and CMa review QAQC plan

Is QAQC Plan accepted?

Yes

Project Team implements QAQC plan

Contractor provides progress reports via regularly scheduled meetings

No

Provide feedback to GC/CC

Refer to Design Quality Review Guide (new Appendix A06, PBS-P100) (OCA development December 2004)

Videos: A/E, Cx SOWs to verify that the QAQC plan complies with the specifications

Project Team may wish to compare the contractor’s QAQC plan to the project’s Cx Plan or the PPT, as appropriate

LINKS

Building Cx Guide | Cx Plan | PBS-P100

PPT | Inspections and Testing Schedule 7.1.6.5.0.0

This page applies to:

☑ Traditional ☑ D/B ☑ D/B-Bridging ☑ CMc
7.0.0.0.0 Construction

Traditional

7.1.6.5.0.0 Inspections and Testing Schedule

---

**Do specifications require GC/CC or GSA testing?**

- **Yes**: GC/CC inspects and tests
  - **Pass?**
    - **Yes**: Proceed and file report
    - **No**: Evaluate results
  - **No**: Project Team submits results reports to contractor

- **No**: Periodically check tests to make sure there are no abnormalities
  - **Yes**: Pass?
    - **Yes**: Accept?
    - **No**: Evaluate results
  - **No**: Conduct test

---

**Coordinate testing schedule with CMa and tenants**

**Project Team coordinates testing schedule with GC/CC and tenants**

---

**Provide feedback to contractor; GC/CC correct deficiencies**

---

**Periodically check tests to make sure there are no abnormalities**

---

**GC/CC coordinates testing schedule**

**GSA inspects and tests**

---

**Project Team submits results reports to contractor**

**GC/CC submits results reports to CMa**

---

**CMc**

---

**GSA - Public Buildings Service**

7.1.6.5.0.0

Construction Page 25
7.0.0.0.0 Construction

7.1.6.6.0.0 Special Testing/Mock-up Plans/Reports

1. GC/CC identifies special testing/mockup plans/reports
2. Project Team reviews contractor's mockup testing/inspection schedule
3. Contractor constructs mockup
4. Contractor conducts test/inspection
5. Contractor submits results/reports to GSA/CMa
6. Pass?
   - Yes: Proceed and document
   - No: No
7. Evaluate results
   - Yes: Accept?
   - No: No

Refer to project specifications for requirements

Contractor conducts test/inspection

Provide feedback to contractor
7.0.0.0.0 Construction
Traditional
7.1.6.1.1.1 Project Web-Cam

Will project use Web-cam?

Yes

Project Team determines type: still, video, time lapse, software, and system requirements

Project Team determines camera logistics: Internet service, location, and power

Coordinate security

Project Team determines users, access levels, and link to PIP

Implement

Typically managed by CMa

No

Don't install

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc
Requests for contract modifications are typically generated from three sources:

- Tenant wants or needs
- GSA programmatic change
- GC/CC wants or needs

Contingency funds may be used only for errors or omissions!

Contingency funds may be used only for errors or omissions!

Project Team and CMa evaluate for merit and calculate impact to budget and time.

Verify funding source and availability.

Develop IGE

Analyze schedule fragnet

Project Team must evaluate the "big picture" impacts - budget and schedule. If the contract modification must proceed, funding documents must be provided accordingly.

Is the request valid?

Yes

Obtain necessary funding documents

Issue RFP

GC/CC responds to RFP

CMa analyzes request proposal

Negotiate

Issue change order Types are: bilateral, PDL, and unilateral

No

Deny request
Evaluations of contractor past performance are required under FAR.

Past performance evaluations are a part of future procurement evaluations criteria.

Evaluations are required at 50 percent completion and substantial completion. If the duration of the project may exceed two years, an annual evaluation is recommended.

Project Team should determine the frequency of evaluations and advise the Contractor(s).

The PM and CO typically complete the evaluations.

All contractors should be evaluated: A/E, GC/CC, CMa, Cx, and other specialty consultants if deemed appropriate.

Go to the NIH Website and complete the evaluation form.

If circumstances indicate a change in the frequency of the evaluations, the Project Team may make changes as deemed appropriate.

Links

NIH Sample Evaluation Form

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc
7.1.10.0.0.0 Follow-up Partnering Session

The Project Team evolves over the life of the project. As contractors (A/E, CMa, CMC, Cx, GC/CC) and special consultants are hired, they become a part of the Project Team.

Project Team discusses need for a follow-up Partnering Session.

Project Team refers to specifications, evaluates health of the project, size and duration of project to determine if follow-up Partnering Session would be beneficial.

Is follow-up Partnering Session needed?

No

No further action required

Yes

Plan Partnering Session

Project Team determines location, date, and time for the Partnering Session and if a Partnering Consultant is required.

Selection Process: consultant or in-house?

In-house Facilitator

Issue a Task Order for Specialty Consultant 6.1.0.0.0.0.a

or

CMa may hire consultant as provided in SOW

Project Team identifies in-house facilitator and determines availability

Project Team invites stakeholders and develops agenda

Project Team conducts Partnering Meeting

Facilitator highlights original Partnering Charter and prepares reports from 2nd meeting.

LINKS

Sample Charters and Reports
Sample Partnering Session Agenda
Sample Partnering Techniques
Suggested Attendees List

Partnering Session 7.1.3.0.0.0.a

This page applies to:

☑ Traditional
☑ D/B
☑ D/B-Bridging
☑ CMc
Project Team determines frequency of updates

Go to www.cii-benchmarking.org and update database

Minimum requirements: at major design and construction milestones

Will require contractor's assistance for cost data

CMa may assist on this task

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc
7.1.8.0.0.0 Construction Excellence Peer Review (1st)
7.1.11.0.0.0 Construction Excellence Peer Review (2nd)

OCA Construction Peer Reviews completed at 15% and 65% completion. The 100% Construction Peer Review is optional.

Is peer review required at 15% completion?

Yes

No peer review necessary

No

The 100% Construction Peer Review is optional.

OCA requests and Project Team completes survey form

OCA coordinates schedule and participates in peer review

Participants: A/E, CMa, GC, GSA, client representatives, and other consultants

Peer review team prepares report

Project team develops action plan

Required for projects over $25 million; optional for projects under $25 million

Request survey form approximately two to three weeks prior to peer review

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
3.0.0.0.0.0 Authorization/Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design/Build
6.0.0.0.0.0 Design
7.0.0.0.0.0 Construction

7.1.8.0.0.0 Construction Excellence Peer Review (1st Review)
7.1.11.0.0.0 Construction Excellence Peer Review (2nd Review)

8.0.0.0.0.0 Tenant Occupancy

LINKS

List of OCA Construction Excellence Council

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc
Is art integral to the construction?

Yes

Meet to determine responsibilities of artist and contractor

Determine schedule for art installation and incorporate into construction schedule

Fabricate and install art

Inspect and accept art installation

No

Coordinate schedule and placement with GC/CC

Schedule, shop drawings, submittals
**7.1.13.0.0 Additional Phases Delivery (TI, Phases, Annexes)**

1. **Project Management Documents**
2. **Planning**
3. **Authorization/Funding**
4. **Site Acquisition**
5. **Design/Build**
6. **Design**
7. **Construction**
   - **Additional Phases Delivery (TI, Phases, Annexes)**
8. **Tenant Occupancy**

- **Project Team determines when phases are to be awarded**
- **Ensure that all contractors’ schedules include overall project milestones**
- **Verify and secure alternate funding sources if required**
- **Award additional phases**

**CPM schedule examples**

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc
7.0.0.0.0 Construction

Traditional

7.1.14.0.0.0 Turnover Documents

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
3.0.0.0.0.0 Authorization/Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design/Build
6.0.0.0.0.0 Design
7.0.0.0.0.0 Construction

7.1.14.0.0.0 Turnover Documents

8.0.0.0.0.0 Tenant Occupancy

O&M Manuals Submittal 7.1.14.3.0.0
Warranties and Certifications 7.1.14.4.0.0
Material Samples, Attic Stock and Spare Parts 7.1.14.6.0.0
Contractor Record Drawings 7.1.14.7.0.0

Review and accept turnover documents

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc

Substantial Completion Certificate Final Completion 7.1.15.0.0.b
Substantial Completion Certificate Final Completion 7.1.15.0.0.c
CMa/CxA establishes list of O&M Manuals

CMa/CxA schedules submission of O&M Manuals

CMa/CxA identifies who will prepare and receive O&M Manuals

CMa/CxA develops format for O&M manuals

Prepare O&M Manuals

Submit O&M Manuals

Review O&M Manuals

Comment

Pass or Fail?

Withhold percentage of payment

Proceed with Property Management Training

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc
Using PMP, CMa/CxA establishes list of warranties and certifications

Determine requirements for start date of warranties and certifications

Identify who will prepare and receive warranties and certifications

Prepare warranties and certifications

Submit warranties and certifications

Review warranties and certifications and report status to Project Team

Project Team reviews and comments

Pass or Fail?

Pass

Contract Record Drawings 7.1.14.7.0.0

Fail

Withhold percentage of payment

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc
Using PMP, CMa/CxA establishes list of material samples, attic stock and spare parts

Determine requirements for storage of material samples, attic stock and spare parts

Identify who will receive and secure material samples, attic stock and spare parts

Submit material samples, attic stock and spare parts

Verify correct quantities of material samples, attic stock and spare parts

Project Team reviews and comments

Pass?

No

Withhold percentage of payment

Yes

Complete
Using PMP, CMa/CxA establishes list of contractor record drawings required

Determine requirements for contractor record drawings

Identify who will receive and secure contractor record drawings

Submit contractor record drawings

Verify correct documentation/as-builts of contractor record drawings

Project Team reviews and comments

Pass?

Withhold percentage of payment

Yes

No

A/E or Contractor?

Contractor

A/E

Prepare record documents from contractor redlines 7.2.1.0.0.0

Complete and distribute as directed by Project Team

A/E Contract for Design 6.2.6.0.0.0

PMP Reference

This page applies to:

Traditional ✓ D/B ✓ D/B-Bridging ✓ CMc

GSA - Public Buildings Service 7.1.14.7.0.0

Construction Page 39
**7.0.0.0.0 Construction**

**Traditional**

### 7.1.14.2.0.0 Systems Start-Up and Testing (Commissioning)

1. **CMa/CxA** reviews list of systems for start-up and testing on Cx Plan.
2. Schedule start-up and testing.
3. Identify who will conduct start-up and testing. (Manufacturer's Rep, CxA, CM, A/E, Property Manager, Tenant if necessary, Contractor's Rep).
4. Develop format for start-up and testing.
5. Perform start-up and testing.
6. Develop punch lists and send to contractor.
7. Contractor takes corrective action.
8. Re-test.

**Pass?**

- **Yes**
- **No**

**Use O&M Manuals**

**LINKS**

- **Cx Plan**
- **PMP Reference**
- **Quality Control Plan**
  - 7.1.2.0.1.2
- **Submittal Schedule/Log/Submissions**
  - 7.1.6.4.0.0
- **Inspections and Testing Schedule**
  - 7.1.6.5.0.0
- **Special Testing/Mock-up Plans/Reports**
  - 7.1.6.6.0.0
- **Turnover Documents**
  - 7.1.14.0.0.0
- **Substantial Completion Certificate: Final Completion**
  - 7.1.15.0.0.0.c
- **Occupancy Permit**
  - 7.1.16.0.0.0

**This page applies to:**

- **Traditional**
- **D/B**
- **D/B-Bridging**
- **CMc**

**Substantial Completion Certification**

- 7.1.15.0.0.0.a

**Pass?**

- **Yes**
- **No**

**Property Management Training**

- 7.1.14.5.0.0
CMa/CxA performs the duties as directed by the Project Team (PMP).

Following the PMP, CMa/CxA establishes list of items requiring training.

Document the training in digital format and save to the EMS.

Develop format for training (digital, online, video).

Identify who will receive training.

Schedule training and coordinate with Project Team.

Perform training.

Project Team reviews and comments.

Pass?

No → Withhold percentage of payment.

Yes → Complete.
7.1.15.0.0.0.b Substantial Completion Certificate: Final Cleaning

Punch Lists 7.1.14.1.0.0.b

Establish schedule for final cleaning

Clean according to cleaning specifications in contract

Pass?

Yes

Closeout (Admin) 7.2.0.0.0.0

No

Make sure retention is held for final cleaning

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc

LINKS

Substantial Completion Certificate: Final Completion 7.1.15.0.0.c
7.0.0.0.0 Construction

Traditional

7.1.16.0.0.0 Occupancy Permit

---

**LINKS**

- **Punch Lists**
  7.1.14.1.0.0.b
- **Systems Startup and Testing**
  7.1.14.2.0.0
- **O&M Manual Submittals**
  7.1.14.3.0.0
- **Substantial Completion Certificate Final Completion**
  7.1.15.0.0.0.c

---

**This page applies to:**

- Traditional
- D/B
- D/B-Bridging
- CMc

---

**GSA Passes?**

- Yes: Building occupancy
- No: Make Corrections, Return to pass/fail

**FPS/USMS Passes?**

- Yes: Determine security testing responsibilities and request final testing
- No: Receive elevator permits, Other/ environmental parties

**Life safety permit in-house and coordinate with city’s Fire Safety Marshal**

Food Service will require outside permits

---

**Project Team coordinates/directs tasks for occupancy permits required**

---

**1.0.0.0.0** Project Management Documents

**2.0.0.0.0** Planning

**3.0.0.0.0** Authorization/Funding

**4.0.0.0.0** Site Acquisition

**5.0.0.0.0** Design/Build

**6.0.0.0.0** Design

**7.0.0.0.0** Construction

**7.1.16.0.0.0 Occupancy Permit**

**8.0.0.0.0** Tenant Occupancy

---

**GSA Passes?**

- Yes: Building occupancy
- No: Make Corrections, Return to pass/fail

**FPS/USMS Passes?**

- Yes: Determine security testing responsibilities and request final testing
- No: Receive elevator permits, Other/ environmental parties

---

**Life safety permit in-house and coordinate with city’s Fire Safety Marshal**

Food Service will require outside permits

---

**Project Team coordinates/directs tasks for occupancy permits required**
Final Inspections

Schedule final inspection

Identify who will conduct final inspection and include tenant

Develop format for final inspection

Perform final inspection

Inspection Passed?

Yes

Start closeout process

No

Develop lists and send to contractor

CMa/CxA performs the following duties as directed by the Project Team (PMP)

Initiate Punch List

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc

LINKS

PMP Reference

Turnover Documents 7.1.14.0.0.0

Substantial Completion Certificate Final Completion 7.1.15.0.0.0.c

GSA - Public Buildings Service 7.1.14.1.0.0.a Construction Page 45
7.0.0.0.0 Construction

Traditional

7.1.14.1.0.0.b Punch Lists

1.0.0.0.0 Project Management Documents
2.0.0.0.0 Planning
3.0.0.0.0 Authorization/Funding
4.0.0.0.0 Site Acquisition
5.0.0.0.0 Design/Build
6.0.0.0.0 Design
7.0.0.0.0 Construction
8.0.0.0.0 Tenant Occupancy

CMa/CxA performs duties as directed by the Project Team (PMP)

Schedule inspections

Project Team identifies who will conduct inspections

Develop format for punch lists inspections

Perform inspections

Contractor takes corrective action

Reinspect

Develop final punch list

Resolve disputed items

Completed Punch List Tasks

Alternate source corrects

Award to alternate source

Deobligate from construction contract

Negotiate cost

Identify source to do work

Develop estimate of cost

Other forces correct?

Yes

Contractor corrects

No

LINKS

Turnover Documents 7.1.14.0.0.0

Final Inspections 7.1.14.1.0.0.a

Substantial Completion Certificate: Final Completion 7.1.15.0.0.0.c

Occupancy Permit 7.1.16.0.0.0

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc

GSA - Public Buildings Service

7.1.14.1.0.0.b

Construction Page 46
7.0.0.0.0 Construction

Traditional

7.1.15.0.0.0.c Substantial Completion Certificate: Final Completion

1.0.0.0.0.0 Project
Management
 Documents
2.0.0.0.0.0 Planning
3.0.0.0.0.0 Authorization/
 Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design/Build
6.0.0.0.0.0 Design
7.0.0.0.0.0 Construction
7.1.15.0.0.0.c Substantial Completion Certificate: Final Completion
8.0.0.0.0.0 Tenant
 Occupancy

Contractor completes all tasks

→

Receive turnover documents

→

Complete and accept final inspections

→

Receive occupancy permits

→

Receive and complete substantial completion certification

→

Complete final cleaning

Pass?

Yes

Issue Substantial Completion Certificate 7.1.15.0.0.0.a

No

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc

LINKS

- Turnover Documents 7.1.14.0.0.0
- Final Inspections 7.1.14.1.0.0.a
- Punch Lists 7.1.14.1.0.0.b
- Systems Start-up and Testing 7.1.14.2.0.0
- O&M Manuals Submittal 7.1.14.3.0.0
- Substantial Completion Certificate: Final Cleaning 7.1.15.0.0.0.b
- Occupancy Permit 7.1.16.0.0.0

GSA - Public Buildings Service

7.1.15.0.0.0.c

Construction Page 47
Some processes may be concurrent

Project Team must ensure all punch list items are completed, all contractor cleaning is completed, system testing is completed, and staff training has been conducted before proceeding to Closeout.
8.3.4.0.1.2 Maintenance and Cleaning Contracts (GC/CC Option)

Project Team refers to PMP, project specifications, evaluates current relationship with contractor, and determines if Maintenance and Cleaning Option with contractor should be exercised.

Will government utilize option or procure new contract?

Yes

CO executes Maintenance and Cleaning Option

No

Refer to PM criteria

Conservators of art

Special requirements (e.g., environmental)

Project Team defines scope of maintenance and cleaning

Coordinate with Property Manager on pending turnover date

Property Manager procures and places award

Project Team coordinates maintenance and cleaning schedule

Phase out GC/phase in maintenance contract

Cleaning contractor obtains security clearance for maintenance contract personnel

Perform regularly scheduled maintenance and cleaning IAW contract

LINKS

- PMP Reference
- O&M Manuals Submittal 7.1.14.3.0.0
- Warranties and Certifications 7.1.14.4.0.0
- Property Management Training 7.1.14.5.0.0
- Substantial Completion Certificate: Final Cleaning 7.1.15.0.0.0.b
- Substantial Completion Certificate: Final Completion 7.1.15.0.0.0.c

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc
7.0.0.0.0 Construction

Traditional

7.2.1.0.0.0 A/E Record Documents

CMa verify redlines are up to date

Exercise GC/CC option or amend A/E contract for record documents

Receive as-built documents from GC/CC

A/E prepares record documents from as-built drawings/documents

Ensure PBS CAD standards are enforced

A/E submits record documents to appropriate parties (regional CIO, tenants, field office)

Pay A/E (or GC/CC) and close out contract

Cx Plan establishes quality control for verification of as-builts

QAQC should also address A/E Record Documents

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc
7.0.0.0.0 Construction
Traditional

7.2.2.0.0 Updated PBS CAD Library Submission

This page applies to:
✓ Traditional ✓ D/B ✓ D/B-Bridging ✓ CMc

Project Team receives A/E Record Documents 7.2.1.0.0.0

Regional CIO or librarian accepts submission

Back check format and content

Is everything there?

Yes → Proceed to Project Closeout

No → A/E takes corrective action

QAQC should address CAD Library submissions

Closeout (Admin) 7.2.0.0.0.0

Closeout (Admin) 7.2.0.0.0

GSA - Public Buildings Service 7.2.2.0.0.0

Construction Page 51
7.2.4.0.0.0 Dedication Ceremony Documents

Project Team contacts Customer Service/Marketing to advise of project completion

Marketing/Customer Service Staff will perform/coordinate the following tasks for planning and executing ceremony documents as well as managing all phases of the Dedication Ceremony

Contact marketing department to notify of completion

Contact appropriate parties to establish ceremony date

Establish ceremony committee

Identify source of funds

Identify number of attendees to schedule facility

Develop invitation list

Provide fact sheets for press releases

Identify stage/dais size and procure

OCA will coordinate preparation of "white books" for the Dedication Ceremony

Pay invoices and release claims

Tear down facility

Write purchase orders for procured items

Set up facility

Procure mementos

Obtain religious figures for invocation and benediction

Obtain a band

Print and mail invitations

Develop program

Identify source of funding for refreshments

Identify sound and lighting system and procure

Project CO typically manages these actions with PM CO

Project funds, RWA, community, etc.

Customer Service/Marketing to advise of project completion

Marketing/Customer Service Staff will perform/coordinate the following tasks for planning and executing ceremony documents as well as managing all phases of the Dedication Ceremony

Contact marketing department to notify of completion

Contact appropriate parties to establish ceremony date

Establish ceremony committee

Identify source of funds

Identify number of attendees to schedule facility

Develop invitation list

Provide fact sheets for press releases

Identify stage/dais size and procure

OCA will coordinate preparation of "white books" for the Dedication Ceremony

Pay invoices and release claims

Tear down facility

Write purchase orders for procured items

Set up facility

Procure mementos

Obtain religious figures for invocation and benediction

Obtain a band

Print and mail invitations

Develop program

Identify source of funding for refreshments

Identify sound and lighting system and procure

Project CO typically manages these actions with PM CO

Project funds, RWA, community, etc.
7.0.0.0.0 Construction

Traditional

7.2.0.0.0 Project Awards (LEED, EnergyStar, AiA, PM, etc.)

1.0.0.0.0 Project
   Management
   Documents

2.0.0.0.0 Planning

3.0.0.0.0 Authorization/
   Funding

4.0.0.0.0 Site Acquisition

5.0.0.0.0 Design/Build

6.0.0.0.0 Design

7.0.0.0.0 Construction

7.2.5.0.0 Project Awards
   (LEED, EnergyStar,
    AiA, PM, etc.)

8.0.0.0.0 Tenant
   Occupancy

---

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc

---

GSA - Public Buildings Service
7.0.0.0.0 Construction
Traditional

7.2.3.1.0.0 Contract Closeout (GC/CC)

Project Team verifies Substantial Completion Certificate: Final Cleaning 7.1.15.0.0.0.b

- Compete final cleaning
- Verify completion of contract(s)
- CMA submits final report

All claims resolved/release of claims received?
Yes
- CO receives final invoice and Release of Claims (GSA Form 1142)

No
- Identify scope of claim
- Determine resolution process (negotiation, ADR, GSBCA, court of claims)

Links
- Release of Claim (GSA Form 1142)
- Substantial Completion Certificate: Final Completion 7.1.15.0.0.0.c

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc

GSA - Public Buildings Service 7.2.3.1.0.0 Construction Page 54
7.2.3.2.1.0 Project Management Closeout

Project Team verifies Substantial Completion Certificate: Final Cleaning

Some of these processes/tasks are concurrent

Project Team completes following tasks for PM closeout

Develop lessons learned

Complete NIH evaluations of A/E, CMa, CxA and CC

Closeout A/E, CMa, CxA and other consultant contracts

Store project files; stored regionally for 2 years; archived for 7 years; disposed of accordingly

Perform final benchmark analysis (TI and Shell)

Breakout final A/E and CM fees into categories of the professional services estimating tool

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
3.0.0.0.0.0 Authorization/Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design/Build
6.0.0.0.0.0 Design
7.0.0.0.0.0 Construction
7.2.3.2.1.0 Project Management Closeout
8.0.0.0.0.0 Tenant Occupancy

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc

LINKS
- Professional Services Estimating Tool
- GC/CC Evaluations (NIH)
7.0.0.0.0 Construction

Traditional

7.2.3.2.0.0 Financial Closeout

Project Team verifies Substantial Completion Certificate: Final Cleaning 7.1.15.0.0.0.b

- Project Team completes tasks for financial closeout
- Close out RWAs if open
- Return balance of funds to appropriate parties
- Is interest due?
  - Yes: Pay interest
  - No: Pay

Concurrent

Retain for possible interest payments from final invoice

Close out items from GSA Financial System

Process all final payments

Project Team compiles all project cost data and completes Real Property Acquisition Advice (GSA Form 1011)

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
3.0.0.0.0.0 Authorization/Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design/Build
6.0.0.0.0.0 Design
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy
8.1.3.0.1.0 Real Property Acquisition Advice
(GSA Form 1011)

Project Team compiles project cost data

Project Team coordinates completion of Real Property Acquisition Advice (GSA Form 1011) with regional PBS Budget office

GSA Form 1011 will detail actual/total capital construction costs and the appropriate amortization schedule

PBS Budget system commences depreciation

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc
Prepare OA using FS estimate

Transmit OA to agency for review

Does agency agree?

Signed OA

Yes

No

Review requirements used to develop cost estimate 2.4.1.0.0.0.a

TI equals ETPC (including contingencies) from draft to final OA

---

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Authorization/ Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design/Build
6.0.0.0.0.0 Design
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy

8.1.1.2.2.0.a Occupancy Agreement Planning Phase (Initial Draft)

LINKS

PBS Pricing Desk Guide
Pricing Implementation for Project Management

Feasibility 2.4.1.0.0.0.a
PDS 2.5.0.0.0.0
Concept Design (Overview) 6.7.0.0.0.0

Design Development (Overview) 8.8.0.0.0.0
Construction Documents 6.9.0.0.0.0
Construction Procurement 6.10.0.0.0.0

(0% to 100% Construction) 7.1.0.0.0.0

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc
Prepare updated OA using PDS estimate

Transmit OA to agency for review

Does agency agree?

Yes
Signed OA submitted with construction (or D/B) prospectus to CO

No
Review requirements used to develop cost estimate in PDS

8.0.0.0.0 Tenant Occupancy

8.1.1.3.0.0 Occupancy Agreement based on PDS-(Proposed Draft)/Updates

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc

GSA - Public Buildings Service

8.1.1.3.0.0
Tenant Occupancy Page 4
8.0.0.0.0 Tenant Occupancy

Traditional

8.1.1.4.0.0 Concept Design

8.1.1.4.1.0 Design Development

8.1.1.4.2.0 Mid-Point Construction Documents

8.1.1.4.3.0 100% Construction Documents

---

**Development of cost/revise estimates based upon prospectus scope**

1. **Conduct analysis to determine if budget is sufficient to cover cost estimate**
   - **Is budget sufficient to cover cost estimate?**
     - Yes
       - **Sign OA**
       - **Determine revisions to requirements**
     - No
       - **Is agency asking for increased scope?**
         - Yes
           - **Determine estimate for the RWA**
           - **Obtain the RWA**
         - No
           - **Revise design to get within budget**
       - **Has the TI estimate changed?**
         - Yes
           - **Revise draft OA**
         - No
           - **Transmit to agency for review**

2. **Review requirements used to develop cost estimates**
   - **Does agency agree?**
     - Yes
       - **Signed OA**
       - **Review requirements used to develop cost estimates**
     - No
       - **Revise design to get within budget**

---

**Links**

- PBS Pricing Desk Guide
- Pricing Implementation for Project Management
- Feasibility 2.4.1.0.0.0
- PDS 2.5.0.0.0
- Design Development (Overview) 6.8.0.0.0
- Construction Documents 6.9.0.0.0
- Construction Procurement 6.10.0.0.0
- (0% to 100% Construction) 7.1.0.0.0

---

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc

---

OAs are updated at major design and construction milestones or as agency needs change.
Project Team conducts analysis to compare proposal costs to final design estimates.

Are budgets sufficient to cover construction proposal costs?

Has the TI estimate changed?

Stop procurement and reevaluate, i.e., obtain an RWA, negotiate with the contractor or redesign, etc.

Revise OA using proposal costs

Award contract

Signed OA

Can costs be reconciled for Shell and TI for Tenant(s)?

Does agency agree?

Signed OA

Redesign or cancel project

Three page applies to:

Traditional

D/B

D/B-Bridging

CMc

GSA - Public Buildings Service 8.1.1.2.0.b
Project Team conducts analysis to compare design estimates with any changes during construction.

Is additional funding required?

Yes

Stop procurement and reevaluate, i.e., obtain an RWA, negotiate with the contractor or redesign, etc.

No

Proceed with construction

Revise OA

Transmit to agency for review

Does agency agree?

Yes

Obtain signature

No

Stop procurement of Change Order and re-evaluate; i.e., obtain RWA, negotiate with GC/CC, re-design, etc. Find alternate solution or cancel Change Order.

This process is repeated throughout the project as changes/change orders arise.
Apply all appropriate costs to space by ABC

Calculate RENT by ABC

Transmit to agency for review

Develop final OA

Are there any changes from last signed OA?

Does agency agree?

Signed OA

Asset Manager completes Real Property Acquisition Advice (GSA Form 1011)

Initial Start RENT

Charge RENT and mediate with agency on outstanding costs
Calculate RENT by ABC
Transmit to agency for review
Develop final OA (reconciliation)
Action Required
Does Agency agree?
Are there any changes from final OA?
Signed OA
Finalize OA in STAR

Use National CAD/CIFM Standards to finalize space assignment by ABC
8.1.2.0.0.0
Finalize project costs
Calculate RENT by ABC
Develop final OA (reconciliation)
Transmit to agency for review

LINKS
PBS Pricing Desk Guide
Pricing Implementation for Project Management
Feasibility 2.1.0.0.0.a
PDS 2.5.0.0.0.0
Concept Design (Overview)
6.7.0.0.0.0
Design Development (Overview)
6.8.0.0.0.0
Construction Documents 6.9.0.0.0.0
GC/CC Source Selection Plan
6.10.1.0.0.0
(0% to 100% Construction)
7.1.0.0.0.0
OAs and RENT (Overview)
8.1.0.0.0.0

This page applies to:
Traditional
D/B
D/B-Bridging
CMc

Initial
RENT
Start
8.1.3.0.0.0

Traditional
Project Team identifies funding source(s)

Project Team reviews PMP and confirms potential resources for National CAD/CIFM Standards

CO awards contract option or task order for delivery of drawings

Contractor prepares National CAD/CIFM Standards IAW contract specifications and submits to GSA for review

Project Team reviews drawings and provides comments to contractor

Contractor incorporates comments and submits final CAD drawings to Project Team

Project Team receives CAD drawings and distributes to PBS library or regional CIO, field office, and tenants as appropriate

Potential resources: A/E, GC/CC or CMa contract options; or IDIQ task order

CMa services may be utilized at any point throughout the project process

LINKS

BOMA Space Measurement Standards

PBS-P100 OAs and RENT (Overview) 8.1.0.0.0.0

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc

GSA - Public Buildings Service 8.1.2.0.0.0
Project Team receives/prepares documents for processing RENT billing

Substantial Completion Certification 7.1.15.0.0.0.a

Final OAs 8.1.1.5.0.1

Real Property Acquisition Advice (GSA Form 1011) 8.1.3.0.1.0

Enter Shell, TI, operating and security costs into STAR

Amortize appropriate capital costs

Estimate building OT usage bills

Send notification to agencies

Initiate RENT billing

Inform central office of initial RENT start

Update PIP for performance measure

Tenant Move-In 8.2.6.0.0.0

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc

GSA - Public Buildings Service 8.1.3.0.0.0
Project Team reviews PMP and implements move/coordination strategy. Team may hire professional move coordinators, IT/Security specialists, etc., as deemed necessary.

Property Manager’s office will be a major stakeholder in systems coordination and installation.

Security Systems Installation 8.2.4.0.0.0

USMS A/V and Security System Installation 8.2.5.0.0.0

Judicial Security Prisoner Security

Tenant Move-In 8.2.6.0.0.0

Initial RENT start 8.1.3.0.0.0
Discuss age of furniture and need for repair/replacement with tenant agencies

A/E inventories furniture and provides furniture layout in the design

Does tenant need new furniture?

Yes

Will agency use in-house sources or FSS?

In-house

Will tenant use in-house sources for inventory and design or A/E?

In-house

Provide A/E estimate for inventory and furniture design

Obtain RWA from agency for furniture inventory and design

A/E inventories furniture and provides furniture layout in the design

Agency coordinates layout with design A/E

Agency procures, installs, and inspects furniture installation

Integrate into CPM schedule

Agency coordinates layout with design A/E

Agency coordinates discussions, advises of options, and proceeds with project development

Discuss age of furniture and need for repair/replacement with tenant agencies

Agency coordinates with Project Team

Agency procures, installs, and inspects furniture installation

Integrate into CPM schedule

Agency coordinates layout with design A/E

Agency procures, installs, and inspects furniture installation

Integrate into CPM schedule

Agency coordinates layout with design A/E

Agency procures, installs, and inspects furniture installation

Integrate into CPM schedule

Agency procures, installs, and inspects furniture installation

Integrate into CPM schedule

Agency procures, installs, and inspects furniture installation

Integrate into CPM schedule

Agency procures, installs, and inspects furniture installation

Integrate into CPM schedule

Agency procures, installs, and inspects furniture installation

Integrate into CPM schedule

Agency procures, installs, and inspects furniture installation

Integrate into CPM schedule

Agency procures, installs, and inspects furniture installation

Integrate into CPM schedule
Determine age of telecommunications system and need for repair/replacement

A/E inventories telecommunications system and provides layout in the design

PBS is required to pay for vertical voice and data risers. Tenant is responsible for horizontal wiring and connections. FTS provides service only.

Does tenant need new telecommunications system?

Yes → Telecommunications Contracts

No → Agency procures, installs, and inspects telecommunications system installation

Agency assumes all responsibility for telecom system (obtain documentation from agency)

Agency coordinates with GSA FTS representative for move of existing telecommunications system

A/E inventories telecommunications system and provides layout in the design

Does tenant need new telecommunications system?

Yes → Telecommunications Contracts

No → Agency procures, installs, and inspects telecommunications system installation

Agency assumes all responsibility for telecom system (obtain documentation from agency)

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc
Agency coordinates telecommunications system design A/E

A/E inventories telecommunications system and provides telecommunications system layout in the design

Provide A/E estimate for inventory and telecommunications system design

Obtain RWA from agency for telecommunications system inventory and design

Will tenant use in-house sources for inventory and design or A/E?

FTS

Agency coordinates telecommunications system design A/E

Will agency use in-house sources or FTS?

In-house

A/E

Agency coordinates layout with design A/E

Agency procures, installs, and inspects telecommunications system installation

AGENCY ASSUMES ALL RESPONSIBILITY FOR TELECOM SYSTEM (obtain documentation from agency)

Develop Telecommunications Contract

Additional Phases Delivery (TI, Phases, Annexes) 7.1.13.0.0.0

Tenant Telecommunications Requirements

CD Submission (60-76%)
Tenant provides requirements for cabling and infrastructure

GSA provides infrastructure (cable trays, conduit, and ducts)

Agency coordinates with GSA field office representative for move of existing or installation of new IT/data systems

Integrate into CPM schedule

Project Team leads discussions and updates IT Data Specialists at monthly project meetings

Telecommunications Installation – R&A

DD Submission (35%)  6.8.5.0.0.0

CD Submission (60-76%)

Additional Phases Delivery 7.1.13.0.0.0

This page applies to:

☑️ Traditional ☑️ D/B ☑️ D/B-Bridging ☑️ CMc

Fixtures, and Equipment (FFE)/ Move-In (Overview) 8.2.0.0.0.0

GSA - Public Buildings Service 8.2.3.0.0.0
8.0.0.0.0 Tenant Occupancy

Traditional

8.2.4.0.0.0 Security Systems Installation

- Project Team commences major security discussion in preparation for PDS
- PDS Design Programming

Does tenant need new security system?
- No: Only general building security is provided for tenant and documented in OA
- Yes:
  - Will agency use in-house sources or DHS FPS?
    - In-house:
      - A/E provides security system design
      - Obtain RWA from agency for security system design
      - Provide A/E estimate for security system design
    - DHS FPS reviews and GSA procures, installs, and inspects security system installation
    - DHS FPS tests, inspects, and accepts security system
  - FPS: Agency coordinates security system design with A/E
  - In-house:
    - Agency procures, installs, and inspects security system installation

- AGENCY ASSUMES ALL RESPONSIBILITY FOR SECURITY SYSTEM (obtain documentation from agency)

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc

Links:

- Fixtures, and Equipment (FFE)/Move-In (Overview) 8.2.0.0.0.0
A/E provides design IAW Pub 64

GSA provides a turn-key security system (wiring, devices, and infrastructure (cable trays, conduit, back boxes and ducts))

GSA uses USMS vendor for turn-key security system design and installation

USMS inspects and reviews

Coordinate for move-in (shake-down period required)

Establish acceptance procedure and documentation with USMS

Pub 64, Section 3, current benchmark includes allowances for procurement and installation of Marshal Security Systems
Establish scope
Survey existing space
Survey furniture and equipment
Establish move-in schedule
Establish responsibilities
Responsibilities, costs, funding, and schedules established
Establish cost

Who will perform the move?
Tenant

Who will pack?
Tenant

GSA provides boxes, labels, and instructions for destination

Tenants move in

GSA Field Office has overall responsibility. Agency appoints move coordinators for debarkation and destination. Mover has onsite representatives designated.

PROJECT TEAM coordinates, negotiates, and mediates move in

Systems Furniture
Agency IT/ Data Systems
Security Systems Installation
USMS A/V and Security Systems Installation
Telecommunications Installation – R&A

Tenant coordinates move schedule with GSA property manager

Tenant moves

Survey existing space
Survey furniture and equipment
Determine when building is ready (all at once or phased)
Determine when agencies are available to move and if they desire a phased move within the agency
Obtain quotes from move vendors

Tenants move in

GSA

Initial RENT Start
8.1.3.0.0.0

This page applies to:

Traditional
D/B
D/B-Bridging
CMc

Fixtures, and Equipment (FFE)/ Move-In (Overview)
Security Systems Installation

LINKS