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

**2.0.0.0.0 Planning**

**Traditional**

**2.0.0.0.0 Planning**

**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

**2.1.0.0.0** Pre-Project Planning

**2.1.0.0.1** (Preliminary) Planning

**2.3.0.0.0** Environmental/NEPA Compliance

**2.4.1.0.0.0** Feasibility

**2.5.0.0.0** PDS

**2.6.0.0.0** Relocation Planning

**Pre-Project Planning (Overview)**

2.1.0.0.0

GSA - Public Buildings Service
2.1.0.0.0 Pre-Project Planning (Overview)

Is it a capital project?

- Yes:
  - Commence FS 2.4.1.0.0.0
  - Select the best alternative
    - Select project delivery method and prepare PMP and AQP 1.1.1.0.0.0

- No:
  - Pre-Project (Preliminary) Planning 2.1.0.0.0.1
    - Project Coordination exists at every level

Overview of Capital Investment and Leasing Program (CILP) process

**Links**

- Project Coordination 1.1.0.0.0.0
- Traditional
- D/B
- D/B-Bridging
- CMc

This page applies to:

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

GSA - Public Buildings Service

2.1.0.0.0.0 Planning

Pre-Project (Preliminary) Planning 2.1.0.0.0.1
2.0.0.0.0 Planning

2.1.0.0.0.1 Pre-Project (Preliminary) Planning

Identify need/driver

- Obtain agency requirements
- Define Facility Master Plan 2.1.1.0.0.0
- Define BER Requirements 2.1.3.0.0.0

PMP: Assemble Project Team 1.1.1.0.0.0.a

Can request be met in existing space?

- Yes
- No

- Initiate FS 2.4.1.0.0.0.a
- 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?

Meet request in BA54 Program Small Projects Process

- Yes
- No

Submit construction prospectus

- Prepare PDS 2.5.0.0.0.0
- Perform informal site selection tasks in support of NEPA, NHPA, and due diligence
- Conduct programming and review benchmarks (OCA-GCCRG)
- Review programming and cost estimates
- No, R&A

- Yes
- No

Is it new construction?

- Yes
- No

See A/E Selection Process and CMa

LINKS

PMP: Assemble Team 1.1.1.0.0.0.a
NHPA 2.2.0.0.0.0
A/E Procurement (Overview) 6.2.0.0.0.0
CMa SOW 6.3.1.0.0.0.a

This page applies to:

Traditional D/B D/B-Bridging CMc

GSA - Public Buildings Service 2.1.0.0.0.1 Planning Page 3
1.0.0.0.0 Project Management Documents

Traditional

1.1.0.0.0.a Project Coordination

Pre-Project
(Preliminary)
Planning
2.1.0.0.0.1

Assume Project Team
1.1.1.0.0.0.a

Design Start-up Workshop
6.1.1.0.1.0

PMP
1.1.0.0.0.b

PIP

Project Website(s)
1.1.5.0.0.0

Project Coordination exists at every level

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

PRE-LIMINARY DOCUMENTS

1.1.0.0.0.a Project Coordination

GSA - Public Buildings Service

1.1.0.0.0.a

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

*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

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.

LINKS

- Pre-Project (Preliminary) Planning 2.1.0.0.0
- NHPA 2.2.0.0.0
- NEPA 2.3.0.0.0
- Feasibility 2.4.1.0.0
- PDS 2.5.0.0.0
- Site Acquisition 4.0.0.0.0

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

GSA - Public Buildings Service

Planning Page 5
2.12.0.2.0 Existing Conditions Assessments

- Local Portfolio Plans 2.1.10.0.0.0
- Campus/Facility Master Plans 2.1.1.0.0.0
- Building Engineering Report 2.1.3.0.0.0
- Accessibility Survey 2.1.4.0.0.0
- Fire/Life Safety Study 2.1.3.1.0.0
- Hazardous Materials Survey 2.1.5.0.0.0
- Highest and Best Use Appraisal (R&A) 2.1.6.0.0.0
- Safety/Security Study(ies) 2.1.8.0.0.0
- Energy Conservation Audit 2.1.9.0.0.0
- Historic Preservation Plan and Cultural Resource Study 2.2.0.0.0.0
- Use Project Consultant Task Order 6.1.0.0.0.0.a
- Include in FS 2.4.1.0.0.0.a
- Include in PDS if D/B 2.5.0.0.0.0

Is additional information needed?

Yes

No

Project Team reviews existing information

Existing condition assessments are required to develop scope and costs for R&A alternatives

Obtain additional information

Incorporate assessments into FS or PDS if D/B

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

Traditional

2.1.10.0.0.0 Local Portfolio Plans

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.

Will the agency request be satisfied within existing inventory?

Is it a capital project?

Yes

Project Team will study viable alternatives in FS 2.4.1.0.0.0.a

Or

PDS if D/B 2.5.0.0.0.0

No

ABT will prioritize in small projects process (BA54)

Yes

Project Team reviews appropriate LPP

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

Would an updated Master Plan benefit the project?

Yes

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

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

Update Master Plan as appropriate

No

Respond to individual requests independently
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.

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

Use Project Consultant Task Order 6.1.0.0.0.a

Include in FS Scope 2.4.1.0.0.a

Include in PDS if D/B 2.5.0.0.0

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
2.0.0.0.0 Planning
Traditional

2.1.4.0.0.0 Accessibility Survey

Project Team consults with Regional Accessibility Officer to determine existing information

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

Is additional information needed?

Yes → Obtain additional studies

No → Incorporate accessibility work items into project scope

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

LINKS

ADA  PBS-P100  UFAS

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

No

Incorporate Fire/Life Safety work items into project scope

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

2.1.5.0.0.0 Hazardous Materials Survey

Hazardous Material 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.

1.0.0.0.0.0 Project
Management
Documents

2.0.0.0.0.0 Planning

2.1.5.0.0.0 Hazardous
Materials
Survey

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 Team consults with Regional IH to determine existing information

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

This page applies to:

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

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

2.1.6.0.0.0 Highest and Best Use Appraisal (R&A)

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

- Yes: Obtain updated appraisal
  - 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

- No: Appraisal data included in FS for R&A alternative cost evaluation or PDS if D/B
2.0.0.0.0 Planning

Traditional

2.1.8.0.0 Safety/Security Study(ies)

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

The benefits of a security charrette will be optimized when completed during the FS for inclusion in project scope and budget.
2.0.0.0.0 Planning

Traditional

2.1.9.0.0.0 Energy Conservation Audit

---

Project Team consults with Regional Energy Coordinator to determine existing information

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

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 → Conduct energy audit

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

---

LINKS

Energy Center of Expertise
HVAC Excellence and Specification
PBS-P100

This page applies to:

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

---

GSA - Public Buildings Service

Planning Page 15
1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
2.4.1.0.0.0.a Feasibility
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

[Diagram of process flow]

- Include PDS scope if D/B
  2.5.0.0.0.0

- Project Team prepares SOW for FS

- Asset Manager provides client housing information

- Award appropriate work to contractors

- Compile available technical studies

- \(\text{Additional technical studies required?}\)
  - Yes
    - Obtain necessary studies by contract
    2.1.12.0.2.0
  - No
    - 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
  2.2.0.0.0.0

- Feasibility: R&A
  2.4.1.0.0.0.c

- Feasibility: New
  2.4.1.0.0.0.d

- Feasibility: Lease
  2.4.1.0.0.0.e

- LPP
- TAPS
- Proforma

- Develop Site Budget
  4.0.0.0.0.0.b

- Define building security amortized capital costs

- OAs and RENT (Overview)
  3.1.0.0.0.0

- DEP&GSA Guidebook I – Acquisition of Real Property
  - 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

- Feasibility 2.4.1.0.0.0.a

- PDS 2.5.0.0.0.0

- This page applies to:
  - Traditional
  - D/B
  - D/B-Bridging
  - CMc
2.0.0.0.0 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

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
- Pricing Implementation for Project Management
- Professional Services Estimating Tool
- PMP 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

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

GSA - Public Buildings Service

2.4.1.0.0.b

Planning Page 17
6.0.0.0.0 Design

Traditional

6.3.0.0.0 CMA/Commissioning Authority (Cx) Services

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

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

Programmatic discussion may be found in the Building Cx Guide.

Planning

Project Team will need Cx assistance during preparation of the FS.

Design

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

Construction

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

Post Construction

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

Develop preliminary Cx Plan and required budget in FS.

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

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

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

LINKS

Building Cx Guide
PBS-P100
PPT

This page applies to:

☑ Traditional ☑ D/B ☑ D/B-Bridging ☑ CMa

CMa SOW 6.3.1.0.0.0.a

CxA SOW (if apart from CMa) 6.3.1.0.0.0.b

GSA - Public Buildings Service

Planning Page 18
**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**

**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**

---

**1.1.1.0.0.b**

**PMP**  
**Acquisition Plan**  
**Program/Project**  
**CMc**
2.0.0.0.0 Planning
Traditional

2.4.1.0.0.c Feasibility: R&A

Project Team conducts study based on construction type

- BER
- Blast
- Progressive collapse
- Glass fragmentation
- Seismic
- Energy
- Serviceability
- High wind
- Security
- Historic
- Environmental
- LEED

R&A alternative has scope and budget data for analysis in Feasibility Phase

Review accessibility
Review fire safety
Review hazardous materials
Review reinvestment index
Review building systems needs

This page applies to:

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

Existing Conditions Assessments
2.1.12.0.2.0

GSA Guidebook I – Acquisition of Real Property

GSA Guidebook II – Relocation of Residents and Businesses

PBS-P100

WBDG

PMP 1.1.1.0.0.0.b

NHPA 2.2.0.0.0.0

NEPA 2.3.0.0.0.0

Feasibility 2.4.1.0.0.0.a

GSA - Public Buildings Service

2.4.1.0.0.c Planning Page 20
Feasibility
2.4.1.0.0.0.a

2.0.0.0.0 Planning
Traditional

2.4.1.0.0.d 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

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

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

**Links**

- GSA Guidebook I – Acquisition of Real Property
- GSA Guidebook II – Relocation of Residents and Businesses
- PBS-P100
- PMP 1.1.0.0.0.b
- Pre-Project (Preliminary) Planning 2.1.0.0.1
- NHPA 2.2.0.0.0.0
- NEPA 2.3.0.0.0.0

**This page applies to:**

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

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

2.0.0.0.0 Planning

Traditional

4.0.0.0.0.a Site Acquisition

Site Investigation for FS

4.0.0.0.0.c

National Historic Preservation Act (NHPA) – Section 106

2.2.0.0.0.0

National Environmental Policy Act (NEPA) Compliance

2.3.0.0.0.0

Site Acquisition

4.0.0.0.0.a
2.0.0.0.0 Planning

4.0.0.0.0.b Site Investigation Tasks for FS

Project Team defines need for capital project

Include in PDS if D/B 2.5.0.0.0

Project Team develops SOW for FS 2.4.1.0.0.0.a

Is site ACQ required for capital project?

Yes

Project Team further defines site ACQ criteria

Project Team formalizes Site Selection Team

Site Team orders special studies*

Site Team initiates preliminary NHPA and NEPA tasks

No

No further action required

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

Real estate market survey

Real estate market appraisals

DA justification

Municipality discussion documentation

Existing/Adjacent site soils report

Preliminary site development cost estimate

*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.
**2.0.0.0.0 Planning**

*Traditional*

**4.0.0.0.0.c Site Investigation for FS**

---

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.

Project Team coordinates scope for FS to address site needs of the project for Due Diligence, NHPA, NEPA, et al. Refer to DEP&P and PBS-P100 for site considerations.

---

**Concurrent Activities**

**NHPA**
- RHP0 coordinates with SHPO. RHP0 briefs Project Team on progress of consultation(s).

Allow 6-12 months in project schedule.

**Special Studies Due Diligence**
- Regional NEPA Program Coordinator manages NEPA studies, public meetings, and mitigation measures.
- Coordinator provides regular updates to Project Team.

Allow 6-15 months in project schedule.

**NEPA**
- Regional NEPA Program Specialist coordinates with RHPO and NEPA Coordinator as needed.
- Specialist manages technical studies, appraisals and relocation estimates and updates Project Team on costs and status.

---

**Site Acquisition**
- Site Acquisition Specialist coordinates with RHPO and NEPA Coordinator as needed.
- Specialist manages technical studies, appraisals and relocation estimates and updates Project Team on costs and status.

---

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

---

**LINKS**

- DEP&P
- GSA Guidebook I – Acquisition of Real Property
- GSA Guidebook II – Relocation of Residents and Businesses
- NEPA
- NHPA
- PBS-P100
- PMP: Assemble Project Team 1.1.0.0.0.a
- PMP 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
- D/B
- D/B-Bridging
- CMc

---

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

<table>
<thead>
<tr>
<th>Task Description</th>
<th>Diagram</th>
</tr>
</thead>
<tbody>
<tr>
<td>RHPO initiates and continues consultation with SHPO as appropriate</td>
<td><img src="image1" alt="Diagram" /></td>
</tr>
<tr>
<td>Mitigate effect under consultation with SHPO</td>
<td>Budget for mitigation such as archaeology or HABS/HAER documentation, etc.</td>
</tr>
<tr>
<td>Discuss/negotiate potential mitigation measures with SHPO</td>
<td></td>
</tr>
<tr>
<td>Execute MOA/PA with SHPO/ACHP</td>
<td>Copy of MOA/PA to Advisory Council on Historic Preservation</td>
</tr>
<tr>
<td>Incorporate mitigation into design documents</td>
<td></td>
</tr>
<tr>
<td>Monitor MOA/PAs and mitigation throughout project delivery</td>
<td>This is an ongoing rather than an ending process</td>
</tr>
<tr>
<td>RHPO updates Project Team as needed</td>
<td></td>
</tr>
</tbody>
</table>

**LINKS**

- Fact Sheet on Executive Order 13006
- 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
- Relocation Planning 2.6.0.0.0.0

**This page applies to:**

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

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GSA - Public Buildings Service  2.2.0.0.0  Planning Page 26
2.0.0.0.0 Planning

Traditional

2.3.0.0.0 NEPA Tasks for FS through Site Acquisition

1.0.0.0.0 Project Management Documents
2.0.0.0.0 Planning
2.3.0.0.0 NEPA Tasks for FS through Site Acquisition
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

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
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 - NEPA completed
ROD
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
1.1.0.0.0.a
PMP
1.1.0.0.0.b
Planning 2.0.0.0.0
Relocation Planning 2.6.0.0.0

This page applies to:
☐ Traditional ☑ GMc ☑ D/B ☑ D/B-Bridging

GSA - Public Buildings Service
0.0.0.0 Planning
2.6.0.0.0 Relocation Planning

1.0.0.0.0 Project Management Documents
2.0.0.0.0 Planning
2.6.0.0.0 Relocation 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

Coordinate with RHPO and NEPA Coordinator as issues are identified

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

Review housing plan and tenant needs/requirements

Is there site-related relocation or swing space?

Site-related relocation

Swing space

Identify the phasing plan assessing unique tenant requirements

Review cost and schedule impacts of required phasing/swing space

Prepare required lease AQP

Incorporate phasing/swing costs into FS and project budget

Complete FS and prepare Site and Design Prospectus

Update FS estimates during PDS for Construction Prospectus submission

Or

Compile site data and prepare Site Prospectus if D/B

2.6.0.0.0 Relocation Planning

LINKS
Fact Sheet on Executive Order 13006
GSA Guidebook I – Acquisition of Real Property
GSA Guidebook II – Relocation of Residents and Businesses
PBS Pricing Desk Guide
Planning 2.0.0.0.0.a
Site Acquisition 4.0.0.0.0.a

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

GSA - Public Buildings Service
2.6.0.0.0
Planning Page 28
2.0.0.0.0 Planning

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

1.1.0.0.0.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.

PMP establishes resources, schedule, and budget

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

PM leads review and update of PMP, including approvals

Confirm customer expectations, including OA reviews/updates

PMP defines project delivery method and procurement strategies

PMGSA - Public Buildings Service

1.1.0.0.0.b

Planning Page 30
Project Team evaluates project needs and discusses project delivery methods.

- Traditional
- CMc
- Design/Build Bridging
- Design/Build

Project Team selects delivery method.

Project Team discusses procurement strategies based on selected delivery method.

- A/E
- CMa
- CxA

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.

[Diagram showing project phases and delivery methods]
1.0.0.0.0 Project Management Documents

1.1.1.0.0.0.d Procurement Snapshot

RECAP – CAPITAL CONSTRUCTION PROCUREMENTS
Apply Source Selection Procurement Procedures
Project Delivery Methods Are Highlighted as Follows:

<table>
<thead>
<tr>
<th>A/E</th>
<th>General Contractor (GC) or Construction Contractor (CC)</th>
</tr>
</thead>
<tbody>
<tr>
<td>A/E Source Selection 6.2.0.0.0.0</td>
<td>Construction Contractor 6.10.0.0.0.0</td>
</tr>
<tr>
<td>Traditional</td>
<td>CMc</td>
</tr>
<tr>
<td>GC should be on board during Concept development by A/E for maximum benefit to GSA</td>
<td>GC should be on board during Concept development by A/E for maximum benefit to GSA</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

Project Team will determine the appropriate time to bring the GC into the project. GSA has seen positive results by involving the GC during the design phase.

Project Team must prepare a comprehensive RFPs to obtain the desired quality building with a good balance for schedule and budget.

The CMc 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

D/B hires 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
REQUIRED PROFESSIONAL SERVICES FOR CAPITAL CONSTRUCTION PROJECTS:

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

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

- **Art-in-Architecture (AiA)**
  - Design Task Order concurrent with A/E NTP
  - 6.1.0.0.0.0.b
  - The process is outlined in the Guide for AiA OCA Program managers are available on this sensitive program.

- **Other Specialty Consultants**
  - Project Team determines the need and timing.
  - 6.1.0.0.0.0.a
  - Procurement procedures apply. Specialty Consultants may be a separate contract or a part of other services provided by CMa, CMc, GC/CC.

**AiA Deliverable**
- 7.1.12.0.0.0

**AiA Concept Design**
- 6.7.14.0.1.0

**AiA Fabrication Task Order**
- 7.1.4.0.0.0

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

Traditional

1.1.0.0.0.f Procurement Recap

- Traditional
- A/E Concepts
  - Design Development
  - Construction Documents
  - Construction Services
- CMa
  - 6.3.1.0.0.0.a
- CxA
  - 6.3.1.0.0.0.b
- AIA
  - 6.1.0.0.0.0.b
- General Contractor
  - Construction
  - 6.10.0.0.0.0
- Project Consultants
  - Design
  - Construction
  - Start-up/Turnover
  - 6.1.0.0.0.0.a

This page applies to:

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

GSA - Public Buildings Service
1.0.0.0.0.0 Project Management Documents

Traditional

1.1.3.1.0.0 Initiate Project in PIP

1.1.3.1.0.0 Initiate Project in PIP

1.1.3.1.0.0 Initiate Project in PIP

Create project in database

- Utilize PMP template
  - 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

This page applies to:

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

**Links**

- Initiate Project in PIP

**This page applies to:**

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

Traditional

1.1.5.0.0.0 Project Website(s)

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

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

Coordinate training/review with internal and external Project Team members

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

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

Define and implement ePM/Websites

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
3.0.0.0.0 Authorization/Funding
Traditional

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

- Regions submit draft prospectus based on CILP requirements
- Central Office reviews submissions
- Central Office runs expert choice model and prioritizes projects
- Central Office submits prospectus to OMB
- Project may be resubmitted in a future FY
- OMB passback
- OMB includes site/design prospectus in President’s budget
- Not approved
- Approved
- Region obtains funding, commences formal site ACQ process and awards A/E contract
- Region submits allowance request to Central Office
- Congress approves budget for site/design
- Project Team commences work on PDS 2.5.0.0.0.0
- OCA hosts Courthouse Orientation and Design Start Workshops 6.1.0.1.0
- OCA issues project directive
- This includes House and Senate authorization and appropriation

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc
OCA issues site and design directive

Regions formally appoint PM (if not previously appointed)

PMs invited to workshops sponsored by the OCA

PM assembles Project Team (Transition is made from ABT)

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
2.0.0.0.0 Planning

Traditional

2.5.0.0.0 Program Development Study (PDS)

1.0.0.0.0 Project Management Documents

2.5.0.0.0 Program Development Study (PDS)

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

---

**LINKS**

- Project Planning Guide (PPG)
- Project Coordination 1.1.0.0.0.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

---

**2.5.0.0.0 Program Development Study (PDS)**

**Flowchart:**

1. **Project Team** formalizes strategy to complete PDS
2. **Assess supporting documents**
3. **Implement PDS procurement strategy**
4. **Regional PT prepares draft construction prospectus**
5. **Use Project Consultant Task Order 6.1.0.0.0.0.a**
6. **Does timing allow use of DE A/E?**
   - **Yes:**
     1. Develop PDS SOW
     2. Select and award PDS contract
     3. Continue stakeholder discussions
     4. Update program goals
     5. Conduct design programming
     6. Update design directives
   - **No:**
     1. Update PMP, OAs, and PDRI 8.1.1.3.0.0
     2. Review security threat and risk analysis
     3. Incorporate additional site and environmental findings
     4. Evaluate budget. This is the last opportunity to ensure correct funding for project.

---

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

**IF New Construction:**

Review and update benchmarks.
3.0.0.0.0 Authorization/Funding

Traditional

3.4.0.0.0.0 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

Project to be resubmitted in future FY

OMB passback

This page applies to:

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

Traditional

6.0.0.0.0 Design

Site Investigation Tasks for FS
4.0.0.0.0.0.b

Site Acquisition
4.0.0.0.0.0.a

A/E Procurement (Overview)
6.2.0.0.0.0

CMa/ Commissioning Authority (Cx) Services
6.3.0.0.0.0

CMa SOW
6.3.1.0.0.0.0.a

CxA SOW (if apart from CMa)
6.3.1.0.0.0.0.b

AI A Contract
6.1.0.0.0.0.0.b

Project Consultant Task Order
6.1.0.0.0.0.0.a

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

Procurements proceed based on the strategies in the PMP and IAW funding guidance and the Site/Design Directives letter.

GC Procurement commences when contract drawings are complete.

Site Selection/ Technical Studies NHPA and NEPA Process (Overview) 4.1.0.0.0.0

This page applies to:

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

Traditional

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

NHPA 2.2.0.0.0.0

Site Investigation 4.0.0.0.0.b

NEPA 2.3.0.0.0.0

Concurrent

Concurrent

RHPO formalizes consultation with SHPO. RHPO updates the Project Team as historic preservation issues are identified.

Site Team is assembled and is typically chaired by the Site Acquisition Specialist

Site Team orders technical studies and updates the Project Team accordingly

If mitigating measures are required in design or construction, the RHPO will continue to monitor the project

Chair updates Project Team on status of site selection process

Regional NEPA Coordinator proceeds on ESA

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

Use Project Consultant Task Order 6.1.0.0.0.a

Rod or FONSI concludes NEPA consultation process

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.

Links:

DEP&P  PBS-P100

Fact Sheet on Executive Order 13006  Pre-Project (Preliminary) Planning 2.1.0.0.0.1

Relocation Planning 2.6.0.0.0.0

This page applies to:

✔ Traditional  ✔ D/B  ✔ D/B-Bridging  ✔ CMc
6.0.0.0.0 Design
Traditional
4.2.0.0.0 Site Acquisition (Overview)

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.

Links
GSA Guidebook I – Acquisition of Real Property
Relocation Planning 2.6.0.0.0.0

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

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
4.2.0.0.0 Site Acquisition (Overview)
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
6.0.0.0.0 Design

Traditional

6.2.0.0.0 A/E Procurement (Overview)

- OCA issues Site and Design Directive
- Develop A/E SOW
- Prepare Source Selection Plan
- Issue RFQ
- Complete Contract Evaluation
- Use Project Consultant Task Order

**Links**

- FS
- PDS
- PMP Reference
- A/E Source Selection/Evaluation Process

**This page applies to:**

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

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 Authorization/Funding
4.0.0.0.0.0 Site Acquisition 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 Tenant Occupancy

1. Project Team reviews prospectus, FS, BER, etc., to determine SOW for A/E
2. Project Team confirms project goals and objectives with all stakeholders
3. Project Team prepares draft SOW and seeks comments from all members and stakeholders
4. Project Team confirms budget, OA issues, and clarifies project delivery method in A/E SOW
5. Comments are incorporated into SOW as appropriate
6. Project Team finalizes SOW
7. Project Team prepares IGE for A/E fee

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
6.0.0.0.0 Design

Traditional

6.4.2.0.0.0 Source Selection Plan

OCA issues Site/Design Directives

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

Two-Stage Selection plus Design Charrette

Three-Stage with Design Competition

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.

Project Team commences DE procedures for A/E selection process

SSA appoints A/E Evaluation Board with OCA approval

A/E Evaluation Board develops Selection Criteria and Evaluation Methodology

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

SSA approves the SSP

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.

Coordinate with CO, OCA and Legal


A/E Source Selection/ Evaluation Process

This page applies to:

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

LINKS

- Acquisition Plan
- DEP&P
- FAR
- GSAM
- PIP template for PMP
- PMP Examples

Samples of Selection Plans
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</td>
</tr>
<tr>
<td></td>
<td>25% - Lead Designer's philosophy and design layout</td>
</tr>
<tr>
<td></td>
<td>25% - Lead Designer's portfolio</td>
</tr>
<tr>
<td></td>
<td>15% - Lead Designer's professional qualifications</td>
</tr>
<tr>
<td>Phase II</td>
<td>50% - Team design performance</td>
</tr>
<tr>
<td></td>
<td>30% - Team organization and management</td>
</tr>
<tr>
<td></td>
<td>15% - Professional qualifications</td>
</tr>
<tr>
<td></td>
<td>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

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

Conduct Phase II interviews and Design Charrette as detailed in PMP

1.1.1.0.0.0.b

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

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

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

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
   6.2.2.0.0.0 6.2.4.0.0.0
   6.2.5.0.0.0 A/E Source Selection/Evaluation Process
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy

D/B-B – it is recommended that the base contract is for schematic design (as defined by Project Team) through final concepts. Provide an option for potential D/B-B services.

Project Team receives approved SSP and commences A/E selection

Prepare and clear CBD and design magazine announcements with approval by region/OCA 6.2.2.0.0.0

Conduct Pre-Proposal Conference to discuss the scope of services required by GSA, the A/E selection process, and the project delivery process

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/Es

Receive Phase II submissions

Advertise for Design Architect – Bridging Design Services

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

Or

Design Competition 6.2.1.0.0.0.c

No

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

GSA selection authority makes final selection

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

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) 6.2.0.0.0.0

This page applies to:

Traditional
D/B
D/B-Bridging
CMc

A/E Contract for Design 6.2.6.0.0.0
6.0.0.0.0.0 Design
Traditional

6.2.6.0.0.0 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

Request audit for salary rates and OH

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

A/E Contract

6.1.0.0.0.0b

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.
6.0.0.0.0 Design

Traditional

6.3.1.0.0.0.a CMa Scope of Work

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
   6.3.1.0.0.0.a CMa Scope of Work
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy

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.

CMa - CM Standards of Practice

Project Team develops CMa SOW

Confirm project goals and objectives

Prepare SOW

Review prospectus, FS, BER, etc.

Confirm construction budgets

Building Cx Guide

CMa Task Order/CxA Task Order 6.3.2.0.0.0

This page applies to:

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

GSA - Public Buildings Service 6.3.1.0.0.0.a Design Page 11
6.3.1.0.0.0.b CxA Scope of Work (if apart from CMa)

Project Team reviews PMP strategy and required Cx services

Project Team confirms project goals and objectives with all stakeholders

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.

Review prospectus, feasibility study, BER, etc.

Confirm construction budgets

Review Building Cx Guide

Finalize SOW

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
6.3.1.0.0.0.b Cx Scope of Work (if apart from CMa)
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy
6.0.0.0.0 Design
Traditional
6.3.2.0.0 CMa Task Order/ CxA Task Order

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.

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

Traditional

6.1.0.0.0.0.b Art-in-Architecture Contract

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

**Process Flow: Art-in-Architecture Contract**

1. **Project Management Documents**
2. **Authorization/Funding**
3. **Site Acquisition**
4. **Design/Build**
5. **Design**
6.1.0.0.0.0.b **Art-in-Architecture Contract**
7. **Construction**
8. **Occupancy**

**Key Points:**
- Must have D/B A/E’s Lead Designer under contract.
- Project Team has awarded A/E contract. SOW includes Lead Designer’s participation on AIA panel. RFAO will coordinate the panel.
- Establish introductory meeting.
- Conduct introductory meeting to review project objectives and artist selection process.
- Solicit for artists (request for interest).
- Schedule and coordinate Artist Review/Panel Meeting(s).
- 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
6.0.0.0.0 Design
Traditional

6.7.0.0.0.1.a Concept Design

Review PMP

Acceptable?

Yes

No

Conduct Programming or Validation/Program Review

Design Charrette Documents 6.7.4.0.0

A/E prepares interim submissions

Prepare interim submission(s)

Acceptable?

Yes

No

Conduct Partnering Workshop/ Kick-off 6.7.2.0.0.0

Design Team may elect to provide some of these services by the CMs

Verify budget compliance by performing IGE

Conduct on-board interviews

Prepare three preliminary concepts

Give presentation(s)

Review of preliminary concept and estimated cost by team, client, peers

Acceptable?

Yes

No

A/E develops final concept

Concept VE workshop 6.7.6.3.0.0

A/E develops final concept

Design Excellence Peer Review 6.7.7.0.0.0

This page applies to:

Traditional D/B D/B-Bridging CMc
6.7.0.0.0.1.b Concept Design (Continued)

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.

6.0.0.0.0.0 Design
Traditional

This page applies to:

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

Use Agency Design Guides

GSA - Public Buildings Service 6.7.0.0.0.1.b Design Page 17
6.7.2.0.0 Concept Design Partnering Workshop

**Pre-planning**
- Compare notes with other PMs and management on their partnering experience and expectations

**Setup**
- Select a facilitator, issue invitations, select location and date. Coordinate procurement activities with your CO.

**Partnering workshop**
- 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.

**Charter**
- Goal is to create a signed charter and schedule any follow-up sessions for team building and partnering.

**Links**
- Design Excellence Peer Review 6.7.7.0.0.0
- Final Concept Presentation to the Commissioner 6.7.14.0.0.0

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

GSA - Public Buildings Service 6.7.2.0.0.0 Design Page 18
Design Charrette, in this context, will be utilized to develop preliminary concepts.

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.

1.1.0.0.0.b

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

Design Charrette may also be used to address project-specific issues: security, site configuration impacts to building mass, etc.

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

OCA is available to assist. Contact the Program Coordinator to provide technical assistance, programmatic specialists, etc.
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
6.7.6.3.0.0 Concept Design Review Comments Including Concept Design Selection and 6.7.9.0.0.0 VE Workshop

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

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

Project Team selects final Concept Design

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 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.

Project Team may include GC if they are on board

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.
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
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

Preferred: include the presentation of the AIA 6.7.14.0.1.0

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

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

GSA - Public Buildings Service 6.7.14.0.0.0 Design Page 23
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
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

Artist initial meeting
Meet panel to discuss goals and objectives, including design team to review options

Artist prepares concept design(s)

Conduct internal GSA review, as necessary
Peer review may occur in this step

No

Present final concept to art panel

Art panel approves concept?

Yes

RA recommends approval of concept to OCA and Commissioner
Art concept may be incorporated into the A/E’s final concept design presentation to Commissioner

LINKS
Concept Design Partnering Workshop 6.7.2.0.0.0

This page applies to:

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

6.8.0.0.1 Design Development (Process)

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
6.8.0.0.1 Design Development (Process)
7.0.0.0.0 Construction
8.0.0.0.0 Tenant Occupancy

**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

---

**6.8.0.0.0 Design Development (Overview) 6.8.0.0.0**

**6.8.0.0.1 Design Development (Process)**

**Conduct DD Program Review Workshop (optional) 6.8.1.0.0.0**
- Review Tenant Telecommunication Requirements
- Update PDRI

**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
- Systems Selection and LCC Analyses 6.8.2.0.0.0
- Owner’s/Code/Constructability Staff Reviews

**Is another interim submission required?**
- Yes
- 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

- No
- Prepare final DD submission
- Follow a loop similar to the loop from above for final design submission

**Conduct DD VE Workshop**
- 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

**Evaluate and Incorporate VE Recommendations**
- 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**

**Confirm Tenant Telecommunication Requirements**
- Confirm pricing policy implementation including document structure for pricing and budget. Collect RWAs, if necessary.

---

**GSA - Public Buildings Service** 6.8.0.0.1}

**Design Page 26**
6.8.0.0.2 Utility Rebate Program Review

- Project Team should coordinate with Regional Energy Advocates and/or Energy Center of Expertise for current program guidance.
- 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 TEAMS**

- Design/Development
- Project Management
- Documents
- Planning
- Authorization/Funding
- Site Acquisition
- Design/BUILD
- Design
- Utility Rebate Program Review
- Construction
- Tenant Occupancy

**LINKS**

- HVAC Excellence
- PBS-P100

**This page applies to:**

- Traditional
- D/B
- D/B-Bridging
- CMc
1. 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: Based on the deliverables from the workshop or tenant meetings, proceed with DDs.

2. 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

3. Verify scope and budget are within the approved prospectus.

4. 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.
6.0.0.0.0 Design

Traditional

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

Links

<table>
<thead>
<tr>
<th>HVAC Excellence</th>
<th>PBS-P100</th>
<th>PMP Reference</th>
</tr>
</thead>
</table>

This page applies to:

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

GSA - Public Buildings Service

6.8.2.0.0

Design Page 29
6.0.0.0.0 Design
Traditional

6.8.5.0.0.0 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
- Project Team must ensure the A/E SOW defines any special requirements in addition to PBS-P100
- 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

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

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

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

Links

PBS-P100
6.0.0.0.0 Design

6.8.9.0.0.0 Construction Strategy/Phasing Plan

Project Team will review 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

Project Team will need to revisit their construction strategy. A brainstorming session with the Project Team, including A/E, CMs, 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 current status of construction procurement and phasing plan strategies
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

This page applies to:

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

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

A/E to validate and incorporate all review comments into 100% CDs

Verify Shell and T.I., Validate Funding Sources

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

Coordinate with A/E Fabrication and Installation 7.1.4.0.0.0

Finalize/issue construction bid documents

OA Update 8.1.1.3.0.0

Verify budget compliance by performing IGE

6.9.0.0.0.0 Design

Traditional

6.9.0.0.0.0 Construction Documents
6.0.0.0.0 Design

Traditional

6.7.13.0.0.0 Independent OCA PBS-P100 Review and IGE (Optional) (90% CDs)

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

Is the program within scope and budget?

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

OCA completes IGE to insure project is within budget

Will OCA order IGE?

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

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

OCA completes compliance review, scope review and IGE

Is the program within scope and budget?

OCA provides feedback to regions for the 100% CD submission

Update OAs as needed 8.1.1.3.0.0

CMa's CD Review/Estimate (100% CDs) 6.7.12.0.0.0

This page applies to:

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

GSA - Public Buildings Service 6.7.13.0.0.0 Design Page 35
6.0.0.0.0 Design
Traditional

6.7.12.0.0.0 CMa's CD Review/Estimate (100% CDs)

- CMa and Project Team reconcile scope or costs as needed
- A/E prepares and submits 100% CDs as directed by Project Team
- A/E updates checklists as needed
- Project Team submits 100% CDs and A/E estimate to CMa for review and IGE
- Project Team ensures any changes requested in previous reviews are included in the 100% CDs
- Is the program within scope and budget?
  - No
    - Update QAs as needed 8.1.1.3.0.0
  - Yes
    - CxA review as specified in Cx Plan
    - Project Team utilizes 100% CDs as the basis for Construction Procurement Documents
    - PBS CAD Library Submission will be submitted by the A/E as directed by the PM/CO
    - Construction Officer will proceed with Construction Procurement when funds are authorized

Links:
- PBS-P100
- PMP Reference
- Professional Services Estimating Tool

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

6.4.10.0.0.0. Construction Contract Award
(Exercise GMP Option)

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

2. GC/CC submits final construction option pricing

3. 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 receives, reviews, and approves submittals
    - No
      - Redesign or commence SS for new GC/CC

- No
  - 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
    - Initiate security clearance process for CC personnel
    - CO requests bonds and insurance
    - Project Team reviews PMP and AQP to confirm strategy and timing for NTP
    - CO prepares to issue NTP

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

Links:
- Acquisition Plan
- PMP Reference

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

GSA - Public Buildings Service

Design Page 37
7.0.0.0.0 Construction
Traditional

6.10.0.0.0 Construction Contract Award and
6.10.15.0.0.0 Pre-NTP Documents (Bonds, Insurance,
Security, etc.)

Project Team requests allowance from OCA/PBS Budget Office

Update OA 8.1.3.0.0

CO issues award and publishes award announcement

Initiate security clearance process of contractor personnel

Request bonds and insurance

Receive, review, and approve

CO issues NTP 7.1.1.0.0.0

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
This page applies to:

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

GSA - Public Buildings Service

7.0.0.0.0

Construction Page 1
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
6.10.1.0.0  Construction Procurement
8.0.0.0.0  Tenant Occupancy

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

7.0.0.0.0 Construction
Traditional
6.10.0.0.0 Construction Procurement

- GC/CC Source Selection Plan
  6.10.1.0.0.0
- Construction Contract (Exercise of GMP Option)
- Advertisement for Construction Services
  6.10.2.0.0.0
- Pre-Proposal Conference
  6.10.4.0.0.0
- Proposal Document Addenda
  6.10.11.0.0.0
- GC/CC Selection Evaluation Factors (Phase I)
  6.10.1.1.0.0
- GC/CC Evaluations/Selection (Phase I)
- GC/CC Submissions (Phase II)
- GC/CC Evaluations/Selection (Phase II)
  6.10.13.0.0.0
- Construction Contract Award and Pre-NTP Documents (Bonds, Insurance, Security, etc.)
  6.10.14.0.0.0
- Construction Document (if D/B-B)
  6.9.0.0.0.0
- Professional Services Task Orders (Construction)
  6.10.16.0.0.0
- AIA Fabrication Task Order
  7.1.4.0.0.0

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

GSA - Public Buildings Service 6.10.0.0.0  Construction Page 2
6.10.1.0.0.0 GC/CC Source Selection Plan

**Project Team reviews AQP and PMP**

- Prepares/updates AQP as needed
- Recommendations: GSA and customer as voting members. A/E and CM as technical advisors.

**Establish SSEB**

**Develop SSP Criteria**

<table>
<thead>
<tr>
<th>GC/CC Evaluation Factors (Phase I) 6.10.1.0.0</th>
<th>GC/CC Evaluation Factors (Phase II) 6.10.13.0.0</th>
</tr>
</thead>
</table>

**Draft SSP**

- Review with legal counsel if necessary

- SSEB reviews and SSA approves SSP
- Revise and resubmit

- Is it approved?
  - No
  - Yes

**Issue SSP**

---

**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 Advertisement for Construction Services

- Project Team reviews Acquisitions Plan, SSP and PMP
- 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

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

Concurrent Activities

Proceed with Proposal Document Addenda
6.10.11.0.0.0

Yes

No

LINKS

FAR GSAM

Sample Agenda GC/CC Source Selection Plan 6.10.1.0.0.0

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc
Traditional CM
cD/B-Bridge

6.10.11.0.0 Proposal Document Addenda

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

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

GSA - Public Buildings Service

6.10.11.0.0

Construction Page 6
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

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

This page applies to:

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

Are price proposals within available funds?

No

Develop negotiation strategy

Implement strategy

Offerors within the competitive range submit BAFO

Yes

SSEB Chairman drafts final report and issues to SSA for approval

Update OA prior to award 8.1.1.3.0.0

Notify offerors
6.10.16.0.0.0 Professional Services Task Orders (Construction)

Determine professional services needed for construction administration

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

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

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

Links:
- AIA Contract 6.1.0.0.0.0.b
7.0.0.0.0.0 Construction

Traditional

7.1.0.0.0.0 Notice To Proceed

- CO issues NTP
  - Include partnering and construction kick-off information in NTP letter

- 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.
7.1.2.0.0.0 Construction Kick-off Meeting

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.

Links:
- Sample Kick-off Meeting Agenda
- Suggested Stakeholders Invitation List
- PMP 1.1.0.0.0.b

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.

7.1.3.0.0.0a Partnering Session

Consultant

Selection process: consultant or in-house?

In-house

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 issues Partnering Charter and report from the meeting

Project Team discusses upcoming Partnering Session

Project Team asks for A/E's input and if they believe a "partnering" consultant would add value to the meeting and enhance meetings

Issue a task order for Specialty Consultant 6.1.0.0.0.a

LINKS

- Sample Charters and Reports
- Sample Partnering Session Agenda
- Sample Partnering Techniques
- Suggested Attendees List
- Follow-up Partnering Session 7.1.10.0.0.0

This page applies to:

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

Traditional

7.1.3.0.0.0.b Partnering Session: Timing Benefits and Drawbacks

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.
Consult with Office of Customer Service: Is groundbreaking needed?

- Yes
  - Determine stakeholders and local dignitaries to invite to ceremony
  - Determine date of groundbreaking
  - Coordinate logistics
  - Have ceremony

- No
  - Construction Administration 7.1.6.0.0.0.a

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

7.1.6.0.0.0.b Construction Administration (Overview)

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.

- 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

- Project Team reviews and approves construction schedules
  7.1.6.2.0.0

- CMa prepares and monitors QA Plan
  7.1.2.0.1.2

- CMa/CSA 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

- GC/CC installs project Web-cam
  7.1.6.1.1.1

- Project Team establishes system and monitors RFIs
  7.1.6.0.0.1.c

- CO processes progress payments law contract specifications and approved schedule

- Project Team reviews and manages project costs
  7.1.6.0.0.1.b

- PM/CO evaluate contractor (NIH) (annually or as deemed appropriate)
  7.1.9.0.0.0

- CMa prepares special testing/mockup plans/reports

- CMa manages safety plan and advises Project Team as deemed appropriate
  7.1.6.0.0.1.a

- 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

GSA - Public Buildings Service

7.1.6.0.0.0.b

Construction Page 18
7.0.0.0.0 Construction
Traditional

7.1.6.0.0.1.a Construction Administration: Safety

![Diagram]

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
7.0.0.0.0.0 Construction
7.1.6.0.0.1.a Construction Administration:
Safety
8.0.0.0.0.0 Tenant Occupancy

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc
Project Team reviews project budget

Update project budget with additional construction information

Periodically monitor and update budget based on change orders and projections

Update OAs to reflect construction changes as necessary

Update PIP to reflect construction changes as necessary

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)

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
5. Respond to contractor
6. Contractor reviews response

Does response merit change order?

Yes

- 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

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
Determine if response is a change order
7.1.6.2.0.0 Construction Schedules

GC/CC contractor submits preliminary CPM schedule

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 schedule reviews and approvals. PM/CO will certify payments within the established process.

Cost loaded schedule must be approved as provided in CPM examples

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

Provide feedback to GC/CC

Provide feedback to contractor

No

No

This page applies to:

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

The links are to CPM Examples and Project Updates in PIP 1.1.3.2.0.0.

GSA - Public Buildings Service

Construction Administration 7.1.6.0.0.0.a
GC/CC contractor prepares and delivers submittal schedule

Provide feedback to contractor

Review submittal schedule

Is submittal schedule accepted?

No

Yes

Project Team establishes process to track submittals

Manage and update submittal log via monthly/weekly scheduled meetings

Typically managed by CMa

Schedule reviewed by A/E, GSA, and CMA

Refer to specifications for submission requirements

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMa

Links

Sample Submittal Schedule
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)

Refer to the A/E, CMa and 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

7.0.0.0.0 Construction

Traditional

7.1.2.0.1.2 Quality Assurance Quality Control Plans/Reports
(QAQC Review Process)
7.0.0.0.0 Construction
Traditional

7.1.6.5.0.0 Inspections and Testing Schedule

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

7.1.6.5.0.0 Inspections and
Testing Schedule

8.0.0.0.0.0 Tenant
Occupancy

This page applies to:

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

LINKS

Cx Plan
Quality Control Plan
7.1.2.0.1.2

GSA - Public Buildings Service

Construction Administration
7.1.6.0.0.0.a

Construction Page 25
7.0.0.0.0 Construction
Traditional

7.1.6.6.0.0 Special Testing/Mock-up Plans/Reports

GC/CC identifies special testing/mockup plans/reports

Project Team reviews contractor's mockup testing/inspection schedule

Refer to project specifications for requirements

Contractor constructs mockup

Contractor conducts test/inspection

Contractor submits results/reports to GSA/CMA

Provide feedback to contractor

Pass?

Yes

No

Evaluate results

No

Yes

Accept?

Proceed and document

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

Verify funding source and availability

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

Develop IGE

Analyze schedule fragment

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

This page applies to:

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

GSA - Public Buildings Service 7.1.6.8.0.0
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)

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

The PM and CO typically complete the evaluations

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
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.

7.1.10.0.0.0 Follow-up Partnering Session

- 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?

- Yes
  - Plan Partnering Session
  - Project Team determines location, date, and time for the Partnering Session and if a Partnering Consultant is required
  - Consultant
    - Issue a Task Order for Specialty Consultant 6.1.0.0.0.0.a
    - In-house Facilitator
      - 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

No
- No further action required
Project Team determines frequency of updates

Minimum requirements: at major design and construction milestones

Will require contractor's assistance for cost data

CMA may assist on this task

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

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

Traditional

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.

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

Is peer review required at 15% completion?

Yes

Project Team coordinates with OCA

OCA requests and Project Team completes survey form

OCA coordinates schedule and participates in peer review

Peer review team prepares report

Project team develops action plan

No

No peer review necessary

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

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

Links

List of OCA Construction Excellence Council

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc
7.1.12.0.0 Art-In-Architecture Deliverable

Is art integral to the construction?

Yes

Meet to determine responsibilities of artist and contractor

Coordinate schedule and placement with GC/CC

Coordinate schedule and placement with GC/CC

Determine schedule for art installation and incorporate into construction schedule

Fabricate and install art

No

Schedule, shop drawings, submittals

Inspect and accept art installation

7.1.12.0.0.0 Art-In-Architecture Deliverable

This page applies to:

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

7.1.13.0.0.0 Additional Phases Delivery (TI, Phases, Annexes)

- 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

This page applies to:

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

GSA - Public Buildings Service
7.0.0.0.0 Construction

Traditional

7.1.14.0.0.0 Turnover Documents

- Project Management Documents
- Planning
- Authorization/Funding
- Site Acquisition
- Design/Build
- Design
- Construction
- 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

This page applies to:

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

Substantial Completion Certification 7.1.15.0.0.0.a

GSA - Public Buildings Service 7.1.14.0.0.0 Construction Page 35
7.1.14.3.0.0 O&M Manuals Submittal

Project Team reviews PMP, Cx Plan, and implementation strategies. The team will look to the CMa or CxA to manage the submittal of O&M Manuals.

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?

Pass

Proceed with Property Management Training 7.1.14.5.0.0

Fail

Withhold percentage of payment

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

GSA - Public Buildings Service

7.1.14.3.0.0

Construction Page 36
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

Fail

Withhold percentage of payment

Contract Record Drawings
7.1.14.7.0.0

LINKS

Cx Plan

PMP Reference

Submittal Schedule/Logs/Submissions
7.1.6.4.0.0

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc
7.1.14.6.0.0 Material Samples, Attic Stock and Spare Parts

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

Property Manager is key player

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

L I N K S

PMP Reference

This page applies to:

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

No

Withhold percentage of payment

Yes

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

This page applies to:

☑ Traditional ☑ D/B ☑ D/B-Bridging ☑ CMc
7.1.14.2.0.0 Systems Start-Up and Testing (Commissioning)

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

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

CMa/CxA reviews list of systems for start-up and testing on Cx Plan

Schedule start-up and testing

Identify who will conduct start-up and testing. (Manufacturer's Rep, CxA, CM, A/E, Property Manager, Tenant if necessary, Contractor's Rep)

Identify special testing equipment

Develop format for start-up and testing

Perform start-up and testing

Develop punch lists and send to contractor

Contractor takes corrective action

Re-test

Pass?

Yes

Substantial Completion Certification 7.1.15.0.0.0.a

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 Competition 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 7.1.14.2.0.0 Construction Page 40
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

LINKS

Cx Plan O&M Manual Submittals 7.1.14.3.0.0

This page applies to:

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

Traditional

7.1.15.0.0.0.a Substantial Completion Certification

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

Links:
- O&M Manual Submittals 7.1.14.3.0.0

Contractor Requests Substantial Completion Certification

- Substantial Completion Certificate: Final Cleaning 7.1.15.0.0.0.b
- Receive Occupancy Permits 7.1.16.0.0.0
- Final Inspections Completed and Accepted 7.1.14.1.0.0.a
- Punch List 7.1.14.1.0.0.b
- Substantial Completion Certificate: Final Completion 7.1.15.0.0.0.c
- Verify Testing is Completed 7.1.14.2.0.0
- Turnover Documents Received 7.1.14.0.0.0
- Final OA 8.1.1.5.0.0
- Tenant Move-in 8.2.6.0.0.0
- Final Cx Report Received

Contractor makes Corrections

- Are all items complete and accepted by CO?

CO Issues Substantial Completion Letter to Contractor

- Make sure retention is held for final completion

Inform central office of substantial completion

Update PIP for substantial completion

Tenant Occupancy

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc
7.1.15.0.0.0.b Substantial Completion Certificate: Final Cleaning

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.b Substantial Completion Certificate: Final Cleaning
8.0.0.0.0.0 Tenant Occupancy

LINKS
- Substantial Completion Certificate: Final Completion 7.1.15.0.0.0.c

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc
7.1.14.1.0.0.a Final Inspections

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

Initiate Punch List

Identify who will conduct final inspection and include tenant

Schedule final inspection

Develop format for final inspection

Perform final inspection

Inspection Passed?

Yes → Start closeout process

No → Develop lists and send to contractor

Links

PMP Reference

Turnover Documents 7.1.14.0.0

Substantial Completion Certificate Final Completion 7.1.15.0.0.0.c

This page applies to:

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

Develop lists and send to contractor

Contractor takes corrective action

Reinspect

Develop final punch list

Resolve disputed items

Contractor corrects

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

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

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

GSA - Public Buildings Service

7.1.14.1.0.0.b

Construction Page 46
7.0.0.0.0.0 Construction

Traditional

7.1.15.0.0.0.c Substantial Completion Certificate: Final Completion

 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 Certification 7.1.15.0.0.0.a

No

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

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

This page applies to:

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

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)

**Property Manager procures and places award**

- **Project Team** coordinates maintenance and cleaning schedule

- **Coordinate with Property Manager on pending turnover date**

- **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 7.1.15.0.0.0.c

---

**This page applies to:**

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

**Planning**

**Authorization/Funding**

**Site Acquisition**

**Design/Build**

**Construction**

**A/E Record Documents**

**Tenant Occupancy**

** traditionally CM C/D/B**

**D/B-D/B-Bridging**

**Program Development Study**

2.5.0.0.0.0

**A/E Contract for Design**

6.2.6.0.0.0

**Construction Administration**

7.1.6.0.0.0.a

**Contractor Record Drawings**

7.1.14.7.0.0

**Contract Closeout (GC/CC)**

7.2.3.1.0.0

**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**

7.2.2.0.0.0

**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
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

This page applies to:

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

Traditional

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

Project funds, RWA, community, etc.

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

OCA will coordinate preparation of “white books” for the Dedication Ceremony

Project CO typically manages these actions with PM CO
7.0.0.0.0 Construction
Traditional

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

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc
7.2.3.1.0.0 Contract Closeout (GC/CC)

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)

CMA submits final report

Verify completion of contract(s)

Compete final cleaning

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

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

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

Some of these processes/tasks are concurrent

LINKS

Professional Services Estimating Tool

GC/CC Evaluations (NIH) 7.1.9.0.0.0

This page applies to:

Traditional  Di/B  Di/B-Bridging  CMc
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

Yes

Pay interest

Pay

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

Is interest due?

No

Retain for possible interest payments from final invoice

Close out items from GSA Financial System

Process all final payments

RWA

This page applies to:

Traditional  ✔  D/B  ✔  D/B-Bridging  ✔  C/Mc
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
8.0.0.0.0 Tenant Occupancy

Traditional

8.0.0.0.0 Tenant Occupancy

This page applies to:

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

GSA - Public Buildings Service 8.0.0.0.0

Tenant Occupancy Page 1
8.0.0.0.0 Tenant Occupancy

Traditional

8.1.0.0.0 Occupancy Agreements and RENT (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
7.0.0.0.0 Construction
8.0.0.0.0 Tenant Occupancy

8.1.0.0.0 Occupancy Agreements and RENT (Overview)

Begin preparation of OA

Extent/type of project?

Limited Scope

Use BA55 (elevators, roof, HVAC, etc.)

No OA required

New or revised tenant space

Verify agency requirements

Initial Draft OA based on FS estimates 8.1.1.2.2.0.a

Update Draft OA based on PDS 8.1.1.3.0.0

Updated Draft OA based on Concept Design

Update Draft OA during DD 8.1.1.3.1.0

Update Draft OA midpoint during prep and 100% of construction documents

Update Draft OA prior to construction award 8.1.1.2.2.0.b

Final Reconcile OA 8.1.1.5.0.0

Archive as-built CAD Drawings 8.1.2.0.0.0

Initial RENT Start 8.1.3.0.0.0

Final OA 8.1.1.5.0.1

Substantial Completion Certificate 7.1.15.0.0.0.a

LINKS

PBS Pricing Desk Guide
Pricing Implementation for Project Management

Feasibility

PDS
Concept Design (Overview)

Design Development (Overview)
Construction Documents
Construction Procurement

(0% to 100% Construction)

This page applies to:

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

GSA - Public Buildings Service

Tenant Occupancy Page 2
8.0.0.0.0 Tenant Occupancy
Traditional

8.1.1.2.0.a Occupancy Agreement Planning Phase
(Initial Draft)

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

8.1.1.2.0.a Occupancy Agreement Planning Phase (Initial Draft)

Prepare OA using FS estimate

Transmit OA to agency for review

Does agency agree?

Yes
Signed OA

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

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 2.5.0.0.0.0

8.0.0.0.0.0 Tenant Occupancy

Traditional

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

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

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
9.0.0.0.0.0 Tenant Occupancy
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

Develop cost/ revise estimates based upon prospectus scope

Determine revisions to requirements

Signed OA

Does agency agree?

Review requirements used to develop cost estimates

Transmit to agency for review

Yes

Revise draft OA

Yes

OAs are updated at major design and construction milestones or as agency needs change

Is budget sufficient to cover cost estimate?

Has the TI estimate changed?

Yes

Is agency asking for increased scope?

No

No

Yes

Obtain the RWA

Determine estimate for the RWA

Revise design to get within budget

ACCEPTED OA stands

No

No

Yes

OAs and RENT (Overview) 8.1.0.0.0.0

GSA - Public Buildings Service 8.1.1.4.0.0

 Tenant Occupancy Page 5
8.1.1.2.2.0.0 Tenant Occupancy

Traditional

8.1.1.2.2.0.0.0 Occupancy Agreement (Accepted Draft): Before Construction Award

Project Team conducts analysis to compare proposal costs to final design estimates

Are budgets sufficient to cover construction proposal costs?

Yes

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

No

Has the TI estimate changed?

Yes

Revise OA using proposal costs

No

Award contract

Signed OA

Does agency agree?

Yes

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

No

Redesign or cancel project

No

Transmit to agency for review

LINKS

PBS Pricing Desk Guide

Pricing Implementation for Project Management

Feasibility

PDS

Concept Design (Overview)

Design Development (Overview)

Construction Documents

Construction Procurement

(0% to 100% Construction)

This page applies to:

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

GSA - Public Buildings Service

 Tenant Occupancy Page 6
8.0.0.0.0 Tenant Occupancy

Traditional

8.1.1.3.1.0 Occupancy Agreement (Accepted Draft): During Construction

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

8.1.1.3.1.0 Occupancy Agreement (Accepted Draft): During Construction

This process is repeated throughout the project as changes/change orders arise

- 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.

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) 6.8.0.0.0.0
- Construction Documents 6.9.0.0.0.0
- (0% to 100% Construction) 7.1.0.0.0.0
- Construction Administration 7.1.6.0.0.0.a

This page applies to:

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

GSA - Public Buildings Service 8.1.1.3.1.0
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
7.0.0.0.0 Construction
8.0.0.0.0 Tenant Occupancy

8.1.1.5.0.1 Final Occupancy Agreement

8.0.0.0.0 Tenant Occupancy

Traditional

8.1.1.5.0.1 Final Occupancy Agreement

Review draft OA and construction costs

Apply all appropriate costs to space by ABC

Calculate RENT by ABC

Develop final OA

Are there any changes from last signed OA?

Transmit to agency for review

Does agency agree?

Yes

Signed OA

Asset Manager completes Real Property Acquisition Advice (GSA Form 1011) 8.1.3.0.1.0

Initial Start RENT 8.1.3.0.0.0

No

SOL

Charge RENT and mediate with agency on outstanding costs

Links:
- GSA Form 1011
- 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
- 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

GSA - Public Buildings Service
Use National CAD/CIFM Standards to finalize space assignment by ABC

Finalize project costs

Calculate RENT by ABC

Develop final OA (reconciliation)

Transmit to agency for review

Action Required

Does Agency agree?

Are there any changes from final OA?

Signed OA

Finalize OA in STAR

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) 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
8.0.0.0.0 Tenant Occupancy

8.1.2.0.0.0 National CAD/CIFM Standards

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

8.1.2.0.0.0 National CAD/CIFM Standards

**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
- National CAD/CIFM 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
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

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

Links:
- PBS Pricing Desk Guide
- Pricing Implementation for Project Management

8.1.3.0.0.0 Initial RENT Start

Traditional

8.0.0.0.0.0 Tenant Occupancy
8.0.0.0.0 Tenant Occupancy
Traditional

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

Project Team reviews PMP and implements move/coordination strategy. Team may hire professional move coordinators, IT/Security specialists, etc., as deemed necessary.

- Systems Furniture 8.2.1.0.0.0
- Telecommunications Installation: R&A 8.2.2.0.0.0.a
- Agency IT/Data Systems 8.2.3.0.0.0
- Security Systems Installation 8.2.4.0.0.0
- USMS A/V and Security System Installation 8.2.5.0.0.0
- Tenant Move-In 8.2.6.0.0.0
- Initial RENT start 8.1.3.0.0.0

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

Judicial Security
Prisoner Security

This page applies to:
- Traditional
- D/I
- D/I-Bridging
- CMc
8.0.0.0.0 Tenant Occupancy

Traditional

8.2.1.0.0.0 Systems Furniture

---

**Project Team** coordinates discussions, advises of options, and proceeds with project development.

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

Does tenant need new furniture? [Yes/No]

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

Agency coordinates with GSA field office for move of existing furniture.

Will agency use in-house sources or FSS? [Yes/No]

**Will tenant use in-house sources for inventory and design or A/E?** [Yes/No]

**Agency procures, installs, and inspects furniture installation**

Agency coordinates with Project Team.

Integrate into CPM schedule.

In-house

In-house

Federal Supply procures, installs, and inspects furniture installation.

**AGENCY ASSUMES ALL RESPONSIBILITY FOR FURNITURE (obtain documentation from agency)**

---

**LINKS**

PDS 2.5.0.0.0

DD Submission (35%) 6.8.5.0.0.0

Additional Phases Delivery (IT, Phases, Annexes) 7.1.13.0.0.0

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

---

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc
Determine age of telecommunications system and need for repair/replacement

Yes

Telecommunications Contracts

No

Agency procures, installs, and inspects telecommunications system installation

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

Cost Estimates from FS 2.4.1.0.0.0.b

PDS Design Programming 2.5.0.0.0.0

Does tenant need new telecommunications system?

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

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.

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

8.2.2.0.0.0.a Telecommunications Installation - R&A

1.0.0.0.0.0 Tenant Occupancy

8.0.0.0.0.0 Tenant Occupancy

Traditional

8.2.2.0.0.0.a Telecommunications Installation - R&A

LINKS

PDS 2.5.0.0.0.0

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

Agency IT Data Systems 8.2.3.0.0.0

This page applies to:

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

GSA - Public Buildings Service

8.2.2.0.0.0.a

Tenant Occupancy Page 14
8.0.0.0.0 Tenant Occupancy

8.2.0.0.0.0.b Telecommunications Installation - New Construction

**TEXT**

**LINKS**

- Fixtures, and Equipment (FFE)/Move-In (Overview)
- Agency IT Data Systems

**This page applies to:**

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

GSA - Public Buildings Service

8.2.2.0.0.0.b
Tenants' 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%)

CD Submission (60-76%)

Additional Phases Delivery

8.2.3.0.0.0 Agency IT/Data Systems

Telecommunications Installation – R&A

DD Submission (35%)

CD Submission (60-76%)

Additional Phases Delivery

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%)

CD Submission (60-76%)

Additional Phases Delivery

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

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

8.2.3.0.0 Agency IT/Data Systems

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

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

8.2.0.0.0.0

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

8.2.3.0.0.0

GSA - Public Buildings Service
8.0.0.0.0 Tenant Occupancy

Traditional

8.2.4.0.0.0 Security Systems Installation

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

8.2.4.0.0.0 Security Systems Installation

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**LINKS**

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

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This page applies to:

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

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GSA - Public Buildings Service

8.2.4.0.0.0
8.0.0.0.0 Tenant Occupancy

Traditional

8.2.5.0.0.0 USMS A/V and Security Systems Installation

Project Team commences major security discussions with USMS during DDs

DD Submission (35%) 6.8.5.0.0.0

CD Submission (60-75%)

Security Design Requirements

Additional Phases Delivery 7.1.13.0.0.0

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

This page applies to:

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

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

This page applies to:

- 8.0.0.0.0.0 Tenant Occupancy

Tenant Occupancy 8.0.0.0.0

GSA - Public Buildings Service 8.2.5.0.0.0

Tenant Occupancy Page 18
8.0.0.0.0 Tenant Occupancy

Traditional

8.2.6.0.0.0 Tenant Move-In

Project Team coordinates, negotiates, and mediates move in

Who will perform the move?

Tenants move in

GSA provides boxes, labels, and instructions for destination

Who will pack?

Survey existing space

Survey furniture and equipment

Establish move-in schedule

Determine when building is ready (all at once or phased)

Establish responsibilities

Determine when agencies are available to move and if they desire a phased move within the agency

Responsibilities, costs, funding, and schedules established

Establish cost

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

LINKS

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

Security Systems Installation 8.2.4.0.0.0

This page applies to:

- Traditional
- D/B
- D/B-Bridge
- CMc