PM Guide

Traditional
Design/Build (D/B)
Design/Build-Bridging (D/B-B)
Construction Management as Constructor (CMc)
This page applies to:

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

Project Coordination exists at every level
2.0.0.0.0 Planning
Design/Build

2.1.0.0.0 Pre-Project Planning (Overview)

Is it a capital project?

Yes

Commence FS
2.4.1.0.0.0.a

Select the best alternative

Select project delivery method and prepare PMP and AQP
1.1.1.0.0.0.b

Traditional or CMC

Design/Build Bridging

Design/Build

Lease Construction

Site and Design Prospectus Submission

Site and Design Authorization

PDS 2.5.0.0.0.0

Construction Prospectus Submission

Construction Authorization (Prospectus) 3.4.0.0.0.0

To be developed in Phase II

No

ABT prioritizes in small projects process (BA54)

Overview of Capital Investment and Leasing Program (CILP) process

Project Coordination exists at every level

This page applies to:

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

GSA - Public Buildings Service

Pre-Project (Preliminary) Planning 2.1.0.0.0.1

Planning Page 2
2.1.0.0.0.1 Pre-Project (Preliminary) Planning

1.0.0.0.0 Project Management Documents
2.0.0.0.0 Planning
2.1.0.0.0.1 Pre-Project (Preliminary) 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

- Identify need/driver
- Can request be met in existing space?
  - No
    - Verify site/design funding?
      - Yes
        - Obtain agency requirements
          - Define Facility Master Plan 2.1.1.0.0.0
          - Define BER Requirements 2.1.3.0.0.0
      - No
        - Perform informal site selection tasks in support of NEPA, NHPA, and due diligence
        - Convene programming and review benchmarks (OCA-GCCRG)
        - Prepare initial draft OAs 8.1.0.0.0.0
        - Prepare draft PMP 1.1.1.0.0.0.b
        - Submit Site Prospectus
        - Receive authority to start site procurements
  - Yes
    - Project Team determines if D/B meets the needs of the project
    - Can request be met in existing space?
      - Yes
        - Submit D/B construction prospectus
        - Prepare D/B PDS 2.5.0.0.0.0
        - Perform informal site selection tasks in support of NEPA, NHPA, and due diligence
        - Review programming and cost estimates
        - Conduct programming and review benchmarks (OCA-GCCRG)
        - Prepare Draft PMP 1.1.1.0.0.0.b
        - Submit Site Prospectus
        - Is it new construction?
          - Yes
            - Meet request in BA54 Program Small Projects Process
          - No, R&O
      - No
        - Conduct programming and review benchmarks (OCA-GCCRG)
        - Prepare Draft PMP 1.1.1.0.0.0.b
        - Submit Site Prospectus
        - Is it new construction?
          - Yes
            - Meet request in BA54 Program Small Projects Process
          - No, R&O

LINKS
- PMP: Assemble Team 1.1.1.0.0.0.a
- Project Coordination 1.1.0.0.0.0.a
- NHPA 2.2.0.0.0.0
- CMa SOW 6.3.1.0.0.0.a

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

Design/Build

1.1.0.0.0.0.a Project Coordination

- Assemble Project Team
  - PMP
  - Design Start-up Workshop
  - Project Website(s)

Pre-Project (Preliminary) Planning

2.0.0.0.0.0 Planning
2.1.0.0.0.0 Site Acquisition
2.4.1.0.0.0 Feasibility
2.5.0.0.0.0 PDS
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

GSA - Public Buildings Service 1.1.0.0.0.0.a Planning Page 4
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.
Existing condition assessments are required to develop scope and costs for R&A alternatives.

Project Team reviews existing information

Is additional information needed?

No

Obtain additional information

Yes

Incorporate assessments into FS or PDS if D/B

Use Project Consultant Task Order

Include in FS

Include in PDS if D/B

Is additional information needed?

No

Obtain additional information

Yes

Incorporate assessments into FS or PDS if D/B

Use Project Consultant Task Order

Include in FS

Include in PDS if D/B
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?

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

Is it a capital project?

Yes

ABT will prioritize in small projects process (BA54)

No

Project Team reviews appropriate LPP
2.0.0.0.0 Planning
Design/Build

2.1.1.0.0.0 Campus/Facility Master Plans

Project Team confirms clients' short-term and long-term needs. 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.

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.
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.

Is it necessary to proceed to next level?

Yes

Complete Level 4 BER to support capital project submission

Include in FS Scope 2.4.1.0.0.0.a

Include in PDS if D/B 2.5.0.0.0.0

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

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
2.1.4.0.0.0 Accessibility Survey

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

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

Is additional information needed?

Yes:
- Obtain additional studies
- Include in FS Scope 2.4.1.0.0.0.a
- Include in PDS if D/B 2.5.0.0.0.0

No:
- Incorporate accessibility work items into project scope

LINKS

ADA  PBS-P100  UFAS

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

Project Team consults with Regional Fire Protection Engineer to determine existing information.

Is additional information needed?

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

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

Incorporate Fire/Life Safety work items into project scope
2.1.5.0.0 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.

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

Yes

Obtain updated appraisal

Appraisal data included in FS for R&A alternative cost evaluation or PDS if D/B

No

Project Team reviews current ABP

Regional term contract

Use Project Consultant Task Order 6.1.0.0.0.0.a

Include in FS Scope 2.4.1.0.0.0.a

Include in PDS if D/B 2.5.0.0.0.0
Consult with FPS/DHS and Building Security Committee to determine applicability of a security charrette.

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.

**LINKS**

ISC  PBS-P100

This page applies to:

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

GSA - Public Buildings Service 2.1.8.0.0.0

Planning Page 14
2.0.0.0.0 Planning
Design/Build

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

Is there an existing building energy audit?

No

No

Yes

Develop energy usage targets for new construction with central office.

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

Use Project Consultant Task Order 6.1.0.0.0.0.a

Conduct energy audit

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
Project Team prepares SOW for FS

Asset Manager provides client housing information

Award appropriate work to contractors

Compile available technical studies

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

Additional technical studies required?

Yes

Obtain necessary studies by contract 2.1.12.0.2

No

Identify alternatives and implementation strategies

Define building security amortized capital costs

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

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

Additional technical studies required?

Yes

Obtain necessary studies by contract 2.1.12.0.2

No

 Identify alternatives and implementation strategies

 Define building security amortized capital costs

 **Feasibility:**

- **R&A**: 2.4.1.0.0.0.c
- **New**: 2.4.1.0.0.0.d
- **Lease**: 2.4.1.0.0.0.e

**Additional technical studies required?**

- **Yes**: Obtain necessary studies by contract 2.1.12.0.2
- **No**: Identify alternatives and implementation strategies

**Define building security amortized capital costs**

**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**

---

**LINKS**

- **DEP&P**
  - GSA Guidebook I – Acquisition of Real Property
  - GSA Guidebook II – Relocation of Residents and Businesses
- **NEPA**
- **NHPA**
- **PBS Pricing Desk Guide**
- **Pre-Project Planning Guide**
- **Preservation Desk Guide**
- **Pricing Implementation for Project Management**
- **PMP 1.1.1.0.0.0.b**
- **Pre-Project (Preliminary) Planning 2.1.0.0.0.1**
- **NHPA 2.2.0.0.0.0**

**This page applies to:**

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

---

**Feasibility 2.4.1.0.0.0.a**

**PDS 2.5.0.0.0.0**

GSA - Public Buildings Service 2.4.1.0.0.0.a Planning Page 16
2.0.0.0.0 Planning
Design/Build

2.4.1.0.0.0 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

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

LINKS

- DEP&P
- GSA Guidebook I – Acquisition of Real Property
- GSA Guidebook II – Relocation of Residents and Businesses
- NEPA
- NHPA
- PBS Pricing Desk Guide
- Pre-Project Planning Guide
- Professional Services Estimating Tool
- Pre-Project (Preliminary) Planning
- Existing Conditions Assessments
- Site Acquisition
- OAs and RENT (Overview)
Design/Build

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 with 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.

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

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

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

GSA - Public Buildings Service

Planning Page 18
6.0.0.0.0.0 Design
Design/Build

6.1.0.0.0.0.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

LINKS

Acquisition Plan | FS | PDS

PMP Reference | Sample PNM | Sample PNP

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc
Project Team conducts study based on construction type

Concurrent evaluations

- 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

1.0.0.0.0 Project Management Documents
2.0.0.0.0 Planning
2.4.1.0.0.0.c Feasibility: R&A

2.0.0.0.0 Planning
2.4.1.0.0.0.c Feasibility: R&A

3.0.0.0.0.0 Authorization/Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design/Build
6.0.0.0.0.0 Design
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy

This page applies to:

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

GSA 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
Existing Conditions Assessments 2.1.12.0.2.0
NHPA 2.2.0.0.0.0
NEPA 2.3.0.0.0.0

GSA - Public Buildings Service 2.4.1.0.0.c Planning Page 20
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
2.0.0.0.0 Planning
Design/Build

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

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc
2.0.0.0.0 Planning  
Design/Build  
4.0.0.0.0.a Site Acquisition
**2.0.0.0.0 Planning**

**Design/Build**

**4.0.0.0.0.b Site Investigation Tasks for FS**

- **Project Team** defines need for capital project
- **Project Team** develops SOW for FS
- Include in PDS if D/B

- **Project Team** further defines site ACQ criteria
- **Project Team** formalizes Site Selection Team
- **Site Team** orders special studies*

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

- **Site Team** initiates preliminary NHPA and NEPA tasks
- **Project Team** estimates site and relocation budget for site/design prospectus

- **Is site ACQ required for capital project?**
  - Yes
  - No further action required

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

**InVESTigation Tasks for FS**

- Real estate market survey
- Real estate market appraisals
- DA justification
- Municipality discussion documentation
- Existing/Adjacent site soils report
- Preliminary site development cost estimate

**LINKS**

- Fact Sheet on Executive Order 13006

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

GSA - Public Buildings Service

4.0.0.0.0.b Planning Page 24
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.

NHPA
RHPO coordinates with SHPO. RHPO briefs Project Team on progress of consultation(s).

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

NEPA
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.

The needs of the project will dictate the level of information study required.

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

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

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

Allow 6-12 months in project schedule

Allow 6-15 months in project schedule

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

2.2.0.0.0 NHPA Tasks for FS through Site Acquisition

RHPO initiates and continues consultation with SHPO as appropriate

Mitigate effect under consultation with SHPO

Discuss/negotiate potential mitigation measures with SHPO

Execute MOA/PA with SHPO/ACHP

Incorporate mitigation into design documents

Monitor MOA/PAs and mitigation throughout project delivery

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

Copy of MOA/PA to Advisory Council on Historic Preservation

This is an ongoing rather than an ending process

RHPO updates Project Team as needed

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

This page applies to:

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

GSA Guidebook I – Acquisition of Real Property
GSA Guidebook II – Relocation of Residents and Businesses
Fact Sheet on Executive Order 13006
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
2.3.0.0.0 NEPA Tasks for FS through Site Acquisition

1. Project Team assigns roles and responsibilities.
2. Project Team coordinates scope for FS to cover NEPA, NHPA, and informal site investigation studies.
3. If CATEX, Initiate NEPA in FS.
4. Phase I may commence at Region’s discretion.
5. Include in PDS if D/B.
6. Gather data/hold public meeting.
8. Revise EA/EIS as needed.
9. Is this a FONSI or ROD?
10. NEPA/RHPO and Site Specialists will update Project Team as needed.
11. RHPO works with Regional NEPA Coordinator to integrate NEPA/NHPA public comment processes.
12. Monitor MOA/PAs and mitigation throughout project delivery.
13. Incorporate NEPA mitigation into design documents.

This page applies to: Traditional, CMc, D/B, D/B-Bridging.
2.0.0.0.0 Planning
Design/Build
2.6.0.0.0 Relocation Planning

Site-related relocation or swing space?

Identify potential project sites and impacts from resident/business displacement

Review cost and schedule impacts for viable alternative sites

Incorporate relocation issues into site cost estimate for FS

Complete FS and prepare Site and Design Prospectus

Update FS estimates during PDS for Construction Prospectus submission

Or

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

Coordinate with RHPO and NEPA Coordinator as issues are identified

Review housing plan and tenant needs/requirements

Is there site-related relocation or swing space?

Swing space

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
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
  - Develop preliminary Cx Plan and required budget in FS
  - Cx integrated into FS and updated in PDS

**Design**
- Include Cx services in A/E, CMa and/or CxA Scopes of Work as determined by Project Team
  - Update Cx Plan as building systems are identified and designed
  - Contract documents aligned with GSA/PBS' Project Requirements

**Construction**
- CMa or CxA executes Cx Plan as to performance, checklists, testing and progress reports
  - Conduct owner training and Turnover Cx Record
  - Systems performance documented and accepted

**Post Construction**
- CMa or CxA performs deferred/seasonal testing, warranty inspections, and completes Final Cx Report
  - Perform Satisfaction Review with tenants and submit findings to Project Team
  - 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
1.0.0.0.0 Project Management Documents

Design/Build

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

Incorporate commissioning

Draft PMP submitted with Site and Design Prospectus

Design 6.0.0.0.0.0

PMP Examples

This page applies to:

Traditional ✓ D/B ✓ D/B-Bridging ☐ CMC

Feasibility 2.4.1.0.0.0.a

GSA - Public Buildings Service 1.1.1.0.0.0.b Planning Page 30
Project Team evaluates project needs and discusses project delivery methods.

Project Team selects delivery method.

Project Team discusses procurement strategies based on selected delivery method.

A/E  CMa  CxA

GC  CMc  Design/Build  Design/Build

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

<table>
<thead>
<tr>
<th>A/E Source Selection</th>
<th>General Contractor (GC) or Construction Contractor (CC)</th>
</tr>
</thead>
<tbody>
<tr>
<td>6.2.0.0.0.0.a</td>
<td>Construction Contractor 6.6.0.0.0.0</td>
</tr>
<tr>
<td></td>
<td>Construction Contractor 6.6.0.0.0</td>
</tr>
<tr>
<td></td>
<td>Construction Contractor 6.6.0.0.0.0</td>
</tr>
<tr>
<td></td>
<td>Construction Contractor 6.6.0.0.0</td>
</tr>
</tbody>
</table>

- **A/E Source Selection**: Project Team will determine if SS will be Two-Stage, Two-Stage Plus Design Charrette or Three-Stage with a Design Competition.
- **General Contractor (GC) or Construction Contractor (CC)**:
  - GC should be on board during Concept development by A/E for maximum benefit to GSA.
  - GC will be on board during Concept development by A/E for maximum benefit to GSA.
  - D/B hires A/E.
  - D/B-Bridging hires A/E.

- **Traditional**:
  - 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 when to bring the D/B-B CC and their A/E on board to maximize bridging benefits from Design A/E to D/B A/E.

- **CMc**:
  - 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.

- **D/B**:
  - 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.

- **D/B-Bridging**:
  - The D/B portion of this procurement will require extensive preparation of the D/B RFPs.

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

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

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc
REQUIRED PROFESSIONAL SERVICES FOR CAPITAL CONSTRUCTION PROJECTS:

<table>
<thead>
<tr>
<th>Service Description</th>
<th>Project Team Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Construction Manager as Agent (CMa)</td>
<td>Concurrent with A/E selection 6.3.1.0.0.0.a</td>
</tr>
<tr>
<td>Commissioning Agent (CxA)</td>
<td>Concurrent with A/E selection 6.3.1.0.0.0.b</td>
</tr>
<tr>
<td>Art-in-Architecture (AIA)</td>
<td>Design Task Order concurrent with A/E NTP 6.1.0.0.0.0.b</td>
</tr>
<tr>
<td>Other Specialty Consultants</td>
<td>Project Team determines the need and timing 6.1.0.0.0.0.a</td>
</tr>
</tbody>
</table>

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

Procurement procedures apply. Specialty Consultants may be a separate contract or a part of other services provided by CMa, CMc, GC/CC.
1.0.0.0.0 Project Management Documents

**Design/Build**

**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

**LINKS**

- Project Coordination 1.1.0.0.0.a

**This page applies to:**

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

Design/Build

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

GSA - Public Buildings Service

Planning Page 36
1.0.0.0.0 Project Management Documents

1.1.5.0.0.0 Project Website(s)

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

Coordinate training/review with internal and external Project Team members

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

Define and implement ePM/Websites

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

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

This page applies to:

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

DrCHECKS
GSA Document Security Requirements

NISPOM
(Classified Documents)

This is for sensitive but not classified documents

GSA - Public Buildings Service 1.1.5.0.0.0 Planning Page 37
3.0.0.0.0 Authorization/Funding
Design/Build

2.4.4.0.0 Project Funding Request

3.4.5.0.0 Budget Authorization Act (Congressional Approval)

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

---

Project may be resubmitted in a future FY

Regions submit draft site prospectus based on CILP requirements and D/B project delivery

Central Office reviews submissions

Central Office runs expert choice model and prioritizes projects

Central Office submits site prospectus to OMB

Region obtains funding, commences formal site ACQ process

Region submits allowance request to Central Office

OCA hosts Courthouse Orientation and Design Start Workshops

OCA issues project directive

Congress approves budget for site

Central Office submits site prospectus to OMB

OMB pass back

OMB includes site prospectus in President’s budget

This includes House and Senate authorization and appropriation

Project Team commences work on PDS for D/B

Approved

Not approved

---

PDS
2.5.0.0.0.0

Site Acquisition
4.0.0.0.0.a

Planning Page 38
6.1.0.0.0.0 Project Management Documents

6.1.0.1.0 Courthouse Orientation and Design Start Workshop

1. OCA issues site and design directive

2. Regions formally appoint PM (if not previously appointed)

3. PMs invited to workshops sponsored by the OCA

4. PM assembles Project Team (Transition is made from ABT)

5. Present PMP to OCA representatives and GSA peers (PMs)

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

7. PMs update PMP as needed

---

**LINKS**

Project Coordination 1.1.0.0.0.a

---

This page applies to:

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

---

GSA - Public Buildings Service

Planning Page 39
Planning

2.5.0.0.0 Program Development Study (PDS)

Project Team formalizes strategy to complete PDS for D/B project delivery

Assess supporting documents

Implement PDS procurement strategy

Use Project Consultant Task Order 6.1.0.0.0.0

Develop PDS SOW

Select and award PDS contract

Continue stakeholder discussions

Update program goals

Conduct design programming

Regional PT prepares draft D/B prospectus

Complete PDS

Update PDRI

Update cost estimates

Review security threat and risk analysis

Incorporate additional site and environmental findings

If R&A: Verify and revise FS estimate. Create uniformat-Level III by Shell and TI.

If New Construction: Review and update benchmarks.

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

This page applies to:

Traditional D/B D/B-Bridging CMc

GSA - Public Buildings Service

Planning Page 40
3.0.0.0.0 Authorization/Funding
Design/Build

3.4.0.0.0 Construction Authorization (Prospectus) for D/B Project Delivery

Regions submit draft D/B prospectus based on CILP requirements

Central Office reviews and prioritizes submissions

Central Office submits prospectus to OMB

Region submits funding and awards D/B contract

Central Office obtains funding

OCA hosts construction start workshop

Congress approves construction budget

OMB includes D/B prospectus in President’s budget

This includes House and Senate authorization and appropriation

OMB pass back

Not approved

Approved

Project to be resubmitted in future FY

This page applies to:

Traditional ✓ D/B ✓ D/B-Bridging ✓ CMc
Procurements proceed based on the strategies in the PMP and IAW with funding guidance and the Site/Design Directives letter.
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

Site Selection includes complex compliance issues to include but not 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.
6.0.0.0.0 Design
Design/Build
4.2.0.0.0 Site Acquisition (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
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

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.

Site Selection
- Determine DA and advertise for sites
- Evaluate sites
- Select top 3 sites
- Announce site selected
- Make site offers
- Clear title
- Develop costs to clean property
- Incorporate mitigation into design documents
- Acquire site

NHPA/NEPA
- Conduct ESA Phase 2 sampling
- Complete NEPA and NHPA
- Is this ROD or FONSI?
- NEPA complete
- FONSI
- ROD
- Deduct cost to clean property
- Determine final property valuation

Appraisal and GeoTech Studies
- ESA completed
- Contract for appraisal
- Perform BTU survey
- Review draft appraisal
- Complete survey
- Review and approve final appraisal

Links
- GSA Guidebook I – Acquisition of Real Property
- Relocation Planning 2.6.0.0.0

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

GSA - Public Buildings Service
4.2.0.0.0.0 Design Page 3
6.0.0.0.0 Design
Design/Build

6.2.0.0.0.a A/E Procurement (Overview)

---

**LINKS**

- **FS**
- **PDS**
- **PMP Reference**
  Advertise for D/B Services 6.6.5.0.0.0.a

---

**This page applies to:**

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

---

GSA - Public Buildings Service

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

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 project delivery method in A/E SOW
5. Comments are incorporated into SOW as appropriate
6. Project Team finalizes SOW
7. Project Team prepares independent GE for A/E fee

REFERENCES
- PBS-P100
- DEP&P
- HVAC Excellence
- LEED
- PBS-P100
- Pricing Implementation for Project Management
- Tenant Requirement Guidelines
- WBDG
- Concept Design 6.7.12.2.0.0

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc
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.
Project Team confirms project goals and objectives with all stakeholders

Finalize SOW

Review prospectus, FS, BER, etc.
Confirm construction budgets
Review Building Cx Guide

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

CMa Task Order/CxA Task Order

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

LINKS
- FS
- PDS
- PMP Reference

GSA - Public Buildings Service 6.3.2.0.0.0
1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
3.0.0.0.0.0 Authorization/Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design/Build
6.0.0.0.0.0 Design
6.1.0.0.0.0.b Art-in-Architecture Contract
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy

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

This page applies to:

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

GSA - Public Buildings Service 6.1.0.0.0.0.b Design Page 10
6.6.0.0.0 Design
Design/Build

6.6.0.0.0 Design/Build Procurement (Overview)

1.0.0.0.0 Project Management Documents
2.0.0.0.0 Planning
3.0.0.0.0 Authorization/Funding
4.0.0.0.0 Site Acquisition
5.0.0.0.0 Design/Build
6.0.0.0.0 Design

6.6.0.0.0 Design/Build Procurement (Overview)

7.0.0.0.0 Construction
8.0.0.0.0 Tenant Occupancy

---

D/B Source Selection Plan
Advertisement for D/B Services
D/B Pre-Proposal Conference and Addenda
D/B Submission (Phase I)
D/B Evaluations/Selection (Phase II)
D/B Submissions (BAFO) Phase II (Team Interviews)
Evaluations/Selection (Phase II)
Design Excellence Peer Review
Final Concept Presentation to Commissioner
AIA Concept Design
D/B Contract

---

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

GSA - Public Buildings Service

Design Page 11
Design/Build

6.6.4.0.0 D/B Source Selection Plan

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

Project Team reviews approved PMP and validates SOW for D/B procurement

Project Team implements AQP for D/B procurement and prepares SSP

Establish SSEB

Develop SSP Criteria

Draft SSP

SSEB reviews and SSA approves SSP

Is it approved?

Yes

Issue SSP

No

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

Review with legal counsel if necessary

Revise and resubmit

This page applies to:

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

6.6.5.0.0.0.a Advertisement for D/B Services

- Project Team reviews AQP, SSP and PMP
- Project Team develops and issues FED BIZ OPS advertisement
- Project Team markets project to prospective D/B contractors
- Coordinate solicitation/RFP distribution following GSA document security policy
- Determine, date, place, and time for pre-proposal conference

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 Advertisement for D/B Services
6.6.5.0.0.0.a Advertisement for D/B Services
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy

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

D/B Source Selection Plan
6.6.4.0.0.0

Design Development (Overview)
6.8.0.0.0.0

D/B Pre-Proposal Conference and Addenda
6.6.5.0.0.0.b
6.0.0.0.0 Design
Design/Build

6.6.5.0.0.0.b D/B Pre-Proposal Conference and Addenda

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
6.6.5.0.0.0.b D/B Pre-Proposal Conference and Addenda
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy

--- LINKS ---
GSA Document Security Requirement
Sample Agenda
D/B Procurement 6.6.0.0.0
Advertisement for D/B Services 6.6.5.0.0.0.a

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

--- Diagram ---

**Project Team** announces date, place, and time for pre-proposal conference

- **Set up site tour(s)** (if applicable)
- **Develop agenda**
- **Conduct meeting and tour**
- **Provide minutes/sign-in sheet to all attendees**

- **Is another pre-proposal conference necessary?**
  - Yes: Receive clarification comments
  - No: Coordinate addenda distribution of hard copies following GSA document security policy

- **Issue/post addenda to FED BIZ OPS**

--- Notes ---

- Develop agenda
- Set up site tour(s) (if applicable)
- Conduct meeting and tour
- Provide minutes/sign-in sheet to all attendees

- Review proposal due date if necessary
- Develop response including narrative sketches, specifications, etc.
- Assemble addenda

--- Additional Notes ---

- Check GSA Document Security Requirement
- Refer to Sample Agenda
- Review D/B Procurement 6.6.0.0.0 and Advertisement for D/B Services 6.6.5.0.0.0.a

---腺苷---
CO receives Phase I proposals

SSEB independently evaluates Phase I proposals

SSEB develops consensus ranking and issues Source Selection Evaluation report on Phase I submittals

Notify offerors

Short-listed D/B contractors receive a stipend to develop three concepts for Phase II as determined by the Project Team

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.

CO determines D/B competitive range, if applicable

**LINKS**

CMa/ Commissioning Authority (Cx) Services

This page applies to:

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

GSA - Public Buildings Service 6.6.6.0.0 Design Page 15

D/B Submission (Phase II) 6.6.8.0.0
6.6.8.0.0.0 D/B Submission Phase (BFAO) (Phase II) (Team Interviews) and 6.6.9.0.0.0 D/B Evaluations/Selection (Phase II)

Optional: On-board reviews are conducted to check for compliance with RFP.

Receive Phase II submissions including price proposals.

SSEB independently evaluates technical Phase II proposals.

Evaluate price proposals.

Conduct Interviews.

Using best value approach, SSEB determines final consensus scores and ranking.

Are negotiations required?

Yes

Develop negotiation strategy.

Implement strategy.

Offerors submit BAFO.

No

SSEB chairman drafts final Source Selection Evaluation Report and issues to SSA for approval.

SSA approves SSE report.

CO notifies offerors.
6.7.7.0.0.0 Design Excellence Peer Review

D/B contractor (proposed) has been selected IAW with RFP. D/B will commence preparations for Concept Presentation to Commissioner.

Project Team will detail the requirements and timing for a DE Peer review for the D/B contractor.

Project Team will coordinate with OCA to schedule the DE Peer Review.

Scheduling/coordination with OCA/Peers should be done 6 to 8 weeks prior.

Lead Designer for D/B contractor responds to Peer Review comments and prepares for presentation for the PBS Commissioner.

CMa services may be utilized at any point throughout the D/B process.

This page applies to:

- [ ] Traditional
- [x] D/B
- [ ] D/B-Bridging
- [ ] CMc
6.0.0.0.0 Design
Design/Build

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

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.

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.
Community outreach is an ongoing process. The design A/E firm may take the lead on some of these efforts, while the PM may be instrumental in arranging meetings with these groups and other GSA consultants.

Coordinate timing to regional policies.

Project Team coordinates the design effort with local planning, zoning, transportation and interest groups.
6.7.14.0.0 Final Concept Presentation to the Commissioner

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

Coordinate meeting logistics.

OCA independent estimate not required.

Preferred: include the presentation of the

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.

Conduct Presentation
6.7.14.0.1.0 Art-in-Architecture Concept Design

- 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
- 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
  - No
- Concept Design Review
- This page applies to: Traditional, D/B, D/B-Bridging, CMc
D/B Contract

6.0.0.0.0 Design
Design/Build

6.6.12.0.0.0 D/B Notice to Proceed

CO issues NTP

Project Team reviews the benefits of holding partnering concurrently with kick-off or delaying until after kick-off

Determine best option

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.

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc
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 CMAs for meeting coordination, recordation, action plans.
7.0.0.0.0 Construction
Design/Build
7.1.3.0.0.0.a Partnering Session

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

Project Team discusses 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

Project Team determines location, date, and time for partnering session and will require a partnering ______

Selection process: Consultant or in-house?

Issue a task order for Project Consultant 6.1.0.0.0.a

Consultant

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

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

GSA - Public Buildings Service 7.1.3.0.0.0.a Design Page 25
Option A: Holding partnering concurrently with kick-off:

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

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

Option B: Delaying partnering until after kick-off:

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

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

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

Consult with Office of Customer Service: Is groundbreaking needed?

Yes

Determine stakeholders and local dignitaries to invite to ceremony

Determine date of groundbreaking

Coordinate logistics

Have ceremony

No

Construction Administration

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

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

6.8.0.0.0 Design Development (Overview)

| 1.0.0.0.0 | Project Management Documents |
| 2.0.0.0.0 | Planning |
| 3.0.0.0.0 | Authorization/Funding |
| 4.0.0.0.0 | Site Acquisition |
| 5.0.0.0.0 | Design/Build |
| 6.0.0.0.0 | Design |

6.8.0.0.0 Design Development (Overview)

| 6.8.0.0.1 | Advertisement for D/B Services |
| 6.8.0.0.2 | D/B Pre-Proposal Conference and Addenda |
| 6.8.0.0.3 | D/B Submission (Phase I) |
| 6.8.0.0.4 | D/B Evaluations/Selection (Phase II) |
| 6.8.0.0.5 | D/B Submissions (BAFO) Phase II (Team Interviews) |
| 6.8.0.0.6 | Evaluations/Selection (Phase II) |
| 6.7.7.0.0 | Design Excellence Peer Review |
| 6.7.14.0.0 | Final Concept Presentation to Commissioner |
| 6.7.14.0.1 | AIA Concept Design |
| 6.7.14.0.2 | D/B Contract |

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

GSA - Public Buildings Service

Design Page 28
Comence AIA contract concurrent with DD Program Review 6.1.0.0.0.0

Partnering Session

Submit baseline schedule

Conduct interim submission(s) review

Conduct DD Program Review Workshop as determined by Project Team 6.8.1.0.0.0

Review Tenant Telecommunication Requirements

Update PDRI

Conduct National CAD/CIFM Standards Completeness Review

Review Tenant Telecommunication Requirements

Verify budget compliance by performing IGE

D/B verifies budget compliance (Shell and TI)

Owners Code Reviews

Is another interim submission required?

Yes

Interdisciplinary Coordination Review

Issue comments to architect

Notify agency if cost estimates have exceeded TI budget. Request additional RWA funds or redesign

No

Prepare final DD submission

Review and issue comments

Participate in DD VE Workshop

Evaluate and Incorporate VE Recommendations

Independent OCA PBS-P100 Review and Estimate 6.8.11.0.0.0

Review Tenant Telecommunication Requirements

Collect RWAs if necessary

Review TI Status with customer

Validate funding sources

OA Update 8.1.1.3.0.0

This item may have been addressed in the RFP

LINKS

National CAD/CIFM Standards

OA Tool

PBS-P100

PDRI

Utility Rebate Program Review 6.8.0.0.2

OA (Accepted Draft): During Construction 8.1.1.3.1.0

This page applies to:

Traditional

D/B

D/B-Bridging

CMc

GSA - Public Buildings Service

Design Page 29
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 Team should review PMP, Cx Plan and status of current programming. PMP strategy may indicate a need for the DD Workshop if certain program parameters are evident.

1.1.1.0.0.0.b

Is a workshop needed?

Yes

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

Based on the deliverables from the workshop or tenant meetings, proceed with DDs

No

Verify scope and budget are within the approved prospectus

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

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

6.8.2.0.0 DD Systems Selection Analyses

A/E defines and sizes base systems and alternatives

A/E performs life cycle cost analysis

DD Submission for Project Team review

Project Team makes system selections

Structural, mechanical, electrical, plumbing, etc.

OCA HVAC peer review

Must be aligned with LEED goals
6.0.0.0.0 Design

Design/Build

6.8.5.0.0 DD Submission (35%)

---

**DD Submission (35%)**

**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.

---

**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.**

---

**LINKS**

**PBS-P100**

---

**This page applies to:**

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

---

GSA - Public Buildings Service

6.8.5.0.0.0

Design Page 33
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, CMa, and several COs may be necessary to develop a new procurement strategy.

Yes

The PM will need to update the PMP to reflect changes in procurement and phasing strategies

The CO will revise the AQP and obtain the necessary approvals

The PM will need to update the PIP to reflect current status of construction procurement and phasing plan strategies
Design/Build

6.8.11.0.0.0 Independent OCA PBS-P100 Review and IGE

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

No design discipline should start work on CDs until the project directive has been approved

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

LINKS

PBS-P100

This page applies to:

☐ Traditional  ☑ D/B  ☑ D/B-Bridging  ☑ CMC
Project Team issues NTP to A/E for construction documents

Project Team determines needs for CD Program Review Workshops (CD start and 90%)

D/B prepares and issues CD Submission (50%)

Project Team reviews and issues comments

A/E validates and incorporates all review comments into 100% CDs

CMa conducts independent verification of review comments and updates IGE

Prepare PBS CAD Library Submission

OCA performs independent review and IGE (Optional)

Coordinate CD Review, CM's CD Review/Estimate; Verify TI estimate if applicable, Validate funding sources, National CAD/CIFM Standards Compliance Review, Quality Assurance Plan Requirements, Security Design Requirements

Note: Team may elect to provide some of these services by the CMa or CMc

Coordinate with AIA Fabrication and Installation

Verify budget compliance by performing IGE

OA Update 8.1.1.3.0.0

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

6.9.3.0.0.0 CD Program Review Workshop (CD Start)

6.9.10.0.0.0 CD Program Review Workshop (90%)

Project Team determines the need for CD Program Review Workshop

Project Team hosts Program Review Workshop when A/E commences CDs

Is the program within scope and budget?

Review PMP

1.1.1.0.0.0

Project Team reviews submission and prepares comments

CMa conducts review and IGE

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

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

A/E prepares Construction Documents 60-75% with cost estimate

A/E performs Coordination Review on 60-75% CDs

A/E submits 60-75% CD submission w/estimate to Project Team

Review and update Cx Plan as needed

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

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

Comprehensive Review Checklists are available in Appendix A

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

Is the program within scope and budget?

Similarly to Concept Program Review

No

Yes

Yes

No

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

Update OAs as needed 8.1.1.3.0.0

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

GSA - Public Buildings Service

6.9.3.0.0.0

Design Page 37
6.7.13.0.0 Independent OCA PBS-P100 Review and IGE (Optional) (90% CDs)

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

7.0.0.0.0 Construction
8.0.0.0.0 Tenant Occupancy

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.

A/E updates checklists as needed.

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

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

Is the program within scope and budget?

Yes

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

OCA completes IGE to insure project is within budget.

Will OCA order IGE?

Yes

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

No

OCA completes compliance review, scope review and IGE.

Is the program within scope and budget?

Yes

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

No

Update OAs as needed 8.1.1.3.0.0

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

Is the program within scope and budget?

Yes

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

A/E updates checklists as needed

No

CMa and Project Team reconcile scope or costs 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

Update OAs as needed 8.1.1.3.0.0

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
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.
7.1.4.0.0.0 Art-in-Architecture Fabrication Task Order

- **Project Team coordinates meeting with commissioned artist, A/E and GC to discuss approved project schedule and proper timing for fabrication and installation of the artwork.**
- **Fabrication Task Order is issued based upon these discussions.**
- **RFAO will coordinate with the artist and keep Project Team advised of any issues on budget or schedule.**

**LINKS**

- AiA Contract 6.1.0.0.0.0.b
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 7.0.0.0.1 Construction Page 2
This page applies to:

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

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

- Project Team reviews and approves construction schedules 7.1.6.2.0.0
- GC/CC prepares submittal schedule, Log and Submissions 7.1.6.4.0.0
- GC/CC coordinates testing schedule law contract 7.1.6.5.0.0
- CMa prepares and monitors QA Plan 7.1.2.0.1.2
- CMa/CxA conducts or prepares inspection schedule/reports 7.1.6.5.0.0
- PM/CO coordinate and manage contract modifications 7.1.6.8.0.0
- CMa prepares special testing/mockup plans/reports
- Project Team establishes system and monitors RFIs 7.1.6.0.0.1.c
- 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 manages safety plan and advises Project Team as deemed appropriate 7.1.6.0.0.1.a
- CO processes progress payments law contract specifications and approved schedule
- Project Team conducts regularly scheduled “progress” meetings. Project updates are provided by disciplines as needed. Special meetings may be called at the discretion of the Project Team.

This page applies to: ✓ Traditional ✓ D/B ✓ D/B-Bridging ✓ CMc
7.1.6.0.0.1.a Construction Administration: Safety

Project Team reviews project-specific Safety Management Plan

Accept plan? Yes

Project Team implements and monitors safety plan

Project Team receives reports

No

Provide feedback to contractor

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc
7.1.6.0.0.1.b Construction Administration: Project Cost Management

- 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 8.1.1.3.1.0
- Update PIP to reflect construction changes as necessary 1.1.3.2.0.0

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.
Project Team develops process to manage RFIs

Contractor submits requests for information to the A/E, CMa

CMa prepares log and tracks the RFI

Responsible party reviews and responds

Respond to contractor

Contractor reviews response

Does response merit change order?

Yes

GC/CC Contract Modifications 7.1.6.8.0.0

No

GC/CC implements response

What are the budget and schedule implications of the contract modifications?
Construction
Administration
7.1.6.0.0.a

7.0.0.0.0 Construction
Design/Build
7.1.6.2.0.0 Construction Schedules

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

GC/CC contractor submits preliminary CPM schedule

Provide feedback to GC/CC

Review schedule

Is preliminary schedule accepted?

Yes

GC/CC submits baseline schedule

Provide feedback to contractor

Project Team reviews baseline schedule

Is baseline schedule approved?

Yes

Project Team establishes process for monthly CPM schedule updates and approvals

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

Update PIP with current payment and schedule information 1.1.3.2.0.0

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

No

Cost loaded schedule must be approved as provided in CPM examples

No
**7.0.0.0.0 Construction**

**Design/Build**

**7.1.6.4.0.0 Submittal Schedule/Log/Submissions**

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

**7.1.6.4.0.0 Submittal Schedule/Log/Submissions**

8.0.0.0.0.0 Tenant Occupancy

**Flowchart:**

- GC/CC contractor prepares and delivers submittal schedule
- Review submittal schedule
- Is submittal schedule accepted?
  - Yes: Project Team establishes process to track submittals
  - No: Provide feedback to contractor

- Manage and update submittal log via monthly/weekly scheduled meetings
  - Typically managed by CMa

- Schedule reviewed by A/E, GSA, and CMa

**Links:**

- Sample Submittal Schedule

**This page applies to:**

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

GSA, A/E, and CMa review QAQC Plan. Is QAQC Plan accepted?

- Yes: Project Team implements QAQC Plan. Contractor provides progress reports via regularly scheduled meetings.
- No: Provide feedback to GC/CC.

Refer to 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.

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

**LINKS**

- Building Cx Guide
- Cx Plan
- PBS-P100
- PPT
- Inspections and Testing Schedule 7.1.6.5.0.0

This page applies to:

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

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

GC/CC inspects and tests
GSA inspects and tests
GC/CC submits results reports to CMa
Project Team submits results reports to contractor

Do specifications require GC/CC or GSA testing?
GC/CC coordinates testing schedule
GSA coordinates testing schedule with GC/CC and tenants

Coordinate testing schedule with CMa and tenants
Provide feedback to contractor; GC/CC correct deficiencies

Conduct test

GC/CC submits results reports to CMa
Project Team submits results reports to contractor

Periodically check tests to make sure there are no abnormalities

Pass?

Yes

No

No

Evaluate results

Proceed and file report

Yes

Accept?

LINKS

Cx Plan
Quality Control Plan 7.1.2.0.1.2

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

GSA - Public Buildings Service 7.1.6.5.0.0 Construction Page 11
GC/CC identifies special testing/mockup plans/reports

Project Team reviews contractor's mockup testing/inspection schedule

Contractor constructs mockup

Contractor conducts test/inspection

Contractor submits results/reports to GSA/CMa

Pass?

Yes

No

Proced and document


Evaluate results

Accept?

No

Yes

Provide feedback to contractor

Refer to project specifications for requirements

Yes

No
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**
Requests for contract modifications are typically generated from three sources:

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

Project Team and CMa evaluate for merit and calculate impact to budget and time. Verify funding source and availability.

- Develop IGE
- Analyze schedule fragnet

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

- Contingency funds may be used only for errors or omissions!

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

Links:
- Construction Administration 7.1.6.0.0.0.a
- Requests for Information 7.1.6.0.0.1.c
Evaluations of contractor past performance are required under FAR 7.0.0.0.0 Construction Design/Build 7.1.9.0.0.0 GC/CC Evaluations (NIH)

Evaluations of contractor past performance 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

LINKS

NIH Sample Evaluation Form

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.

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

Is follow-up Partnering Session needed?

No

Yes

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

Selection Process: consultant or in-house?

Consultant

In-house Facilitator

1. Issue a Task Order for Specialty Consultant 6.1.0.0.0.0.a
2. CMa may hire consultant as provided in SOW

Project Team identifies in-house facilitator and determines availability

Project Team invites stakeholders and develops agenda

Project Team conducts Partnering Meeting

Facilitator highlights original Partnering Charter and prepares reports from 2nd meeting
Project Team determines frequency of updates

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

Minimum requirements: at major design and construction milestones

Will require contractor's assistance for cost data

CMa may assist on this task

LINKS

PMP 1.1.1.0.0.0.b
CMa SOW 6.3.1.0.0.0.a

This page applies to:

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

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

Is peer review required at 15% completion?

Yes

OCA requests and Project Team completes survey form

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

No peer review necessary

No

OCA coordinates schedule and participates in peer review

Peer review team prepares report

Project team develops action plan

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

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

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

Project Team coordinates with OCA
7.1.12.0.0.0 Art-In-Architecture Deliverable

Is art integral to the construction?

Yes

Meet to determine responsibilities of artist and contractor

Determine schedule for art installation and incorporate into construction schedule

Fabricate and install art

Inspect and accept art installation

No

Coordinate schedule and placement with GC/CC

Schedule, shop drawings, submittals
7.1.13.0.0.0 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

CPM schedule examples
7.0.0.0.0 Construction
Design/Build

7.1.14.0.0.0 Turnover Documents

Project Team receives turnover documents

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

Review and accept turnover documents

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

LINKS

Substantial Completion Certificate: Final Cleaning 7.1.15.0.0.0.b
Substantial Completion Certificate: Final Completion 7.1.15.0.0.0.c

This page applies to:

Traditional ☑ D/B ☑ D/B-Bridging ☑ CMc
7.1.14.0.0.0 Construction
Design/Build

7.1.14.3.0.0 O&M Manuals Submittal

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 Design/Build
6.0.0.0.0.0 Design
7.0.0.0.0.0 Construction
7.1.14.3.0.0 O&M Manuals Submittal
8.0.0.0.0.0 Tenant Occupancy

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

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.

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

Determine requirements for start date of warranties and certifications

Identify who will prepare and receive warranties and certifications

Prepare warranties and certifications

Submit warranties and certifications

Review warranties and certifications and report status to Project Team

Project Team reviews and comments

Pass or Fail?

Pass

Contract Record Drawings 7.1.14.7.0.0

Fail

Withhold percentage of payment
Using PMP, CMa/CxA establishes list of material samples, attic stock and spare parts

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

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

Submit material samples, attic stock and spare parts

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

Project Team reviews and comments

Pass?

No

Withhold percentage of payment

Yes

Complete

Property Manager is key player

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?

Yes

A/E or Contractor?

No

Withhold percentage of payment

Contractor

A/E

Prepare record documents from contractor redlines

Complete and distribute as directed by Project Team

This page applies to:

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

LINKS

PMP Reference
A/E Procurement
Task Order for D/B
RFP Preparation
6.2.0.0.0.0.b
7.1.14.2.0.0 Systems Start-Up and Testing (Commissioning)

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

Substantial Completion Certification 7.1.15.0.0.0.a

Pass?

Yes

No

Re-test

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc
Following the PMP, CMa/CxA establishes list of items requiring training

Document the training in digital format and save to the EMS

Develop format for training (digital, online, video)

Identify who will receive training

Schedule training and coordinate with Project Team

Perform training

Project Team reviews and comments

Pass?

No

Withhold percentage of payment

Yes

Complete
7.0.0.0.0 Construction
Design/Build

### 7.1.15.0.0.0.a Substantial Completion Certification

**Diagram:**
- **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**
  - 8.1.5.0.0.0
- **Tenant Move-in**
  - 8.2.6.0.0.0
- **Final Cx Report Received**

**Links:**
- O&M Manual Submittals
  - 7.1.14.3.0.0

**This page applies to:**
- Traditional
- D/B
- D/B-Bridging
- CMC
7.0.0.0.0.0 Construction
Design/Build

7.15.0.0.0.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

7.15.0.0.0.b Substantial Completion
Certificate: Final Cleaning

8.0.0.0.0.0 Tenant
Occupancy

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

Punch Lists
7.1.14.1.0.0.b

Establish schedule for final cleaning

Clean according to cleaning specifications in contract

Pass?

Yes → Closeout (Admin)
7.2.0.0.0.0

No → Make sure retention is held for final cleaning
7.0.0.0.0 Construction
Design/Build

7.1.16.0.0.0 Occupancy Permit

Project Team coordinates/directs tasks for occupancy permits required

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

GSA Passes?

Yes

Building occupancy

No

Receive elevator permits

Other/ environmental parties

Determine security testing responsibilities and request final testing

FPS/USMS Passes?

Yes

Food Service will require outside permits

Make Corrections

Return to pass/fail

No

Other/ environmental parties

O&M Manual Submittals 7.1.14.3.0.0

Substantial Completion Certificate: Final Completion 7.1.15.0.0.0.c

Systems Start-up and Testing 7.1.14.2.0.0

Punch Lists 7.1.14.1.0.0.b

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 7.1.14.1.0.0.b

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
7.0.0.0.0 Construction
Design/Build

7.1.14.1.0.0.b Punch Lists

- CMa/CxA performs duties as directed by the Project Team (PMP)
- Schedule inspections
- Project Team identifies who will conduct inspections
- Develop format for punch lists inspections
- Perform inspections
- Contractor takes corrective action
- Reinspect
- Develop final punch list
- Resolve disputed items

Completed Punch List Tasks:
- Alternate source corrects
- Award to alternate source
- Deobligate from construction contract
- Negotiate cost
- Identify source to do work
- Develop estimate of cost

Contractor corrects:
- Yes
- Other forces correct?

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

GSA - Public Buildings Service
1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
3.0.0.0.0.0 Authorization/ Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design/Build
6.0.0.0.0.0 Design
7.0.0.0.0.0 Construction
7.1.15.0.0.0.c Substantial Completion Certificate: Final Completion

7.1.15.0.0.0.c Substantial Completion Certificate: Final Completion

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

LINKS
- Turnover Documents 7.1.14.0.0.0
- Final Inspections 7.1.14.1.0.0.a
- Punch Lists 7.1.14.1.0.0.b
- Systems Start-up and Testing (Commissioning) 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

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
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 property management criteria

Conservators of art

Special requirements (e.g., environmental)

Project Team defines scope of maintenance and cleaning

Coordinate with Property Manager on pending turnover date

Property Manager procures and places award

Project Team coordinates maintenance and cleaning schedule

Phase out GC/phase in maintenance contract

Cleaning contractor obtains security clearance for maintenance contract personnel

Perform regularly scheduled maintenance and cleaning IAW contract

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

7.2.1.0.0.0 A/E Record Documents

CMa verify redlines are up to date

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

Receive as-built documents from GC/CC

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

Ensure PBS CAD standards are enforced

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

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

Cx plan establishes quality control for verification of as-builts

QAQC should also address A/E Record Documents

LINKS

Cx Plan  QAQC Plan  PDS 2.5.0.0.0.0

A/E Procurement Task Order for D/B RFP Preparation 6.2.0.0.0.0.b

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

This page applies to:

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

GSA - Public Buildings Service
7.2.1.0.0.0
Construction Page 36
7.2.2.0.0.0 Updated PBS CAD Library Submission

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
7.2.4.0.0.0 Dedication Ceremony Documents

- Project Team contacts Customer Service/Marketing to advise of project completion
- 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
- 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 funds, RWA, community, etc.

Project CO typically manages these actions with PM CO

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

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

Project Team provides information for award criteria

LEED
EnergyStar
AiA
PM
GSA Design Awards (Biennial)

Cx Plan/Report
A/E
OCA

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc
7.2.3.1.0.0 Contract Closeout (GC/CC)

- Compete final cleaning
- Verify completion of contract(s)
- CMa submits final report
- All claims resolved/release of claims received?
  - Yes
    - CO receives final invoice and Release of Claims (GSA Form 1142)
  - No
    - Identify scope of claim
    - Determine resolution process (negotiation, ADR, GSBCA, court of claims)

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

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

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc
7.2.3.2.1.0 Project Management Closeout

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

- Project Team completes following tasks for PM closeout

- Develop lessons learned

- Complete GC/CC evaluations (NIH) of A/E, CMa, CxA and CC
  7.1.9.0.0.0

- 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)
  7.1.7.0.0.0

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

---

**LINKS**

- Professional Services Estimating Tool
- GC/CC Evaluations (NIH) 7.1.9.0.0.0

---

**This page applies to:**

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

---

GSA - Public Buildings Service

7.2.3.2.1.0

Construction Page 41
7.0.0.0.0 Construction
Design/Build

7.2.3.2.0.0 Financial Closeout

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

Project Team completes tasks for financial closeout

Close out RWAs if open

Return balance of funds to appropriate parties

Is interest due?

Yes

Pay interest

No

Retain for possible interest payments from final invoice

Close out items from GSA Financial System

Pay

Process all final payments

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

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

LINKS

RWA

This page applies to:

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

GSA - Public Buildings Service

Real Property Acquisition Advice (GSA Form 1011) 8.1.3.0.1.0

Construction Page 42
8.1.3.0.1.0 Real Property Acquisition Advice (GSA Form 1011)

Project Team compiles project cost data

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

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

PBS Budget system commences depreciation

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

Design/Build

8.0.0.0.0 Tenant Occupancy

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

OAs and RENT (Overview) 8.1.0.0.0.0

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

Operations/Service

Post-Occupancy (1 Year After Occupancy) Cx Services

OAs – Concepts – 6.7.14.0.0.0

OAs – End of Design Development – 6.8.0.0.0.0

OAs – 100% Construction Documents – 6.9.0.0.0.0

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

Transmit OA to agency for review

Does agency agree?

Signed OA

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

PDS 2.5.0.0.0.0
D/B Contract 6.6.12.0.0.0
Final Concept Presentation to the Commissioner 6.7.14.0.0.0

Design Development (Overview) 6.8.0.0.0.0
Construction Documents 6.9.0.0.0.0

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

Transmit OA to agency for review

Does agency agree?

Yes

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

No

Review requirements used to develop cost estimate in PDS

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

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
D/B Contract 6.6.12.0.0.0

Final Concept Presentation to the Commissioner 6.7.14.0.0.0
Design Development (Overview) 6.8.0.0.0.0
Construction Documents 6.9.0.0.0.0

This page applies to:

☑ Traditional ☑ D/B ☑ D/B-Bridging ☑ CMc
Conduct analysis to determine if budget is sufficient to cover cost estimate.

Revise design to get within budget.

Determine estimates for the RWA.

Obtain the RWA.

Does agency agree?

Has the TI estimate changed?

Signed OA

Review requirements used to develop cost estimates.

Transmit to agency for review.

Revise draft OA.

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

Does agency agree?

Is budget sufficient to cover cost estimate?

Is agency asking for increased scope?

Accepted OA stands

Has the TI estimate changed?

Signed OA

Review requirements used to develop cost estimates.

Transmit to agency for review.

Revise draft OA.

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

Does agency agree?

Is budget sufficient to cover cost estimate?

Is agency asking for increased scope?

Accepted OA stands

Has the TI estimate changed?

Signed OA

Review requirements used to develop cost estimates.

Transmit to agency for review.

Revise draft OA.

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

Does agency agree?

Is budget sufficient to cover cost estimate?

Is agency asking for increased scope?

Accepted OA stands

Has the TI estimate changed?

Signed OA

Review requirements used to develop cost estimates.

Transmit to agency for review.

Revise draft OA.

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

Are budgets sufficient to cover construction proposal costs?
- 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
- Yes
  - Does agency agree?
    - Yes
      - Transmit to agency for review
    - No
      - Redesign or cancel project
- No
  - Can costs be reconciled for Shell and TI for Tenant(s)
    - Yes
      - Transmit to agency for review
    - No
      - Redesign or cancel project
Project Team conducts analysis to compare design estimates with any changes during construction.

- Is additional funding required?
  - Yes: Stop procurement and reevaluate, i.e., obtain an RWA, negotiate with the contractor or redesign, etc.
  - No: Proceed with construction

- Revise OA
  - Transmit to agency for review
    - Does agency agree?
      - Yes: Obtain signature
      - No: Stop procurement of Change Order and re-evaluate; i.e., obtain RWA, negotiate with GC/ CC, re-design, etc. Find alternate solution or cancel Change Order.

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

** LINKS **

- PBS Pricing Desk Guide
- Pricing Implementation for Project Management
- PDS 2.5.0.0.0.0
- Design Development (Overview) 6.8.0.0.0.0
- Construction Documents 6.9.0.0.0.0
- Construction Administration 7.1.6.0.0.0.a

** This page applies to:**

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

---

8.0.0.0.0.0 Tenant Occupancy

7.1.6.0.0.0.a

---

8.1.1.3.1.0 Occupancy Agreement (Accepted Draft): During Construction

OAs and RENT (Overview) 8.1.0.0.0.0

---

GSA - Public Buildings Service 8.1.1.3.1.0

Tenant Occupancy Page 7
Apply all appropriate costs to space by ABC

Calculate RENT by ABC

Transmit to agency for review

Develop final OA

Are there any changes from last signed OA?

Does agency agree?

Signed OA

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

Initial RENT Start 8.1.3.0.0.0

Charge RENT and mediate with agency on outstanding costs
8.0.0.0.0 Tenant Occupancy
Design/Build

8.1.1.5.0.0 Final Occupancy Agreement (Reconciliation)

Use National CAD/CIFM Standards to finalize space assignment by ABC
8.1.2.0.0.0

Finalize project costs

Calculate RENT by ABC

Develop final OA (reconciliation)

Transmit to agency for review

Does Agency agree?

Are there any changes from Final OA?

Yes

Signed OA

Finalize OA in STAR

No

This page applies to:

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

Links

PBS Pricing Desk Guide
Pricing Implementation for Project Management

D/B Contract
Design Development (Overview)

Construction Documents
OAs and RENT (Overview)

GSA - Public Buildings Service

Tenant Occupancy Page 9
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

This page applies to:

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

Final OA Reconciliation 8.1.1.5.0.0

GSA - Public Buildings Service 8.1.2.0.0.0

Tenant Occupancy Page 10
8.0.0.0.0 Tenant Occupancy

Design/Build

8.1.3.0.0.0 Initial RENT Start

Project Team receives/ prepares documents for processing RENT billing

- Substantial Completion Certification 7.1.15.0.0.0.a

- Final OAs 8.1.1.5.0.1

- Real Property Acquisition Advice (GSA Form 1011) 8.1.3.0.1.0

Enter Shell, TI, operating and security costs into STAR

Amortize appropriate capital costs

Estimate building OT usage bills

Send notification to agencies

Tenant Move-In 8.2.6.0.0.0

Initiate RENT billing

Inform central office of initial RENT start

Update PIP for performance measure

LINKS

PBS Pricing Desk Guide
Pricing Implementation for Project Management

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

GSA - Public Buildings Service

Tenant Occupancy Page 11
Project Team reviews PMP and implements move/coordination strategy. Team may hire professional move coordinators, IT/Security specialists, etc., as deemed necessary.

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

- **Systems Furniture**
  - 8.2.1.0.0.0

- **Telecommunications Coordination and Installation**
  - 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

- **Judicial Security**
  - **Prisoner Security**

- **Tenant Move-In**
  - 8.2.6.0.0.0

- **Initial RENT start**
  - 8.1.3.0.0.0

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

GSA - Public Buildings Service

Tenant Occupancy Page 12
Discuss age of furniture and need for repair/replacement with tenant agencies

Agency inventories furniture and provides furniture layout in the design

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

Agency procures, installs, and inspects furniture installation

Agency coordinates layout with design A/E

In-house

Will agency use in-house sources or FSS?

In-house

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

A/E

Provide A/E estimate for inventory and furniture design

Obtain RWA from agency for furniture inventory and design

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

Federal Supply procures, installs, and inspects furniture installation

Does tenant need new furniture?

Yes

No

Agency coordinates with GSA field office for move of existing furniture

Agency coordinates layout with Project Team

Integrate into CPM schedule

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

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

Cost Estimates from FS 2.4.1.0.0.0.b

PDS Design Programming 2.5.0.0.0.0

Determine age of telecommunications system and need for repair/replacement

Does tenant need new telecommunications system?

Yes → Telecommunications Contracts

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

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

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

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

Does tenant need new telecommunications system?

Yes → Telecommunications Contracts

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

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

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

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

Does tenant need new telecommunications system?

Yes → Telecommunications Contracts

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

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

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

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

Does tenant need new telecommunications system?

Yes → Telecommunications Contracts

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

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

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

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

Does tenant need new telecommunications system?

Yes → Telecommunications Contracts

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

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

8.2.2.0.0.0.b Telecommunications Installation - New Construction

**Agency coordinates telecommunications system design A/E**

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

**Provide A/E estimate for inventory and telecommunications system design**

**Obtain RWA from agency for telecommunications system inventory and design**

**Agency coordinates telecommunications system design A/E**

**In-house**

**Will agency use in-house sources or FTS?**

**In-house**

**Agency coordinates telecommunications system design A/E**

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

**FTS procures, installs, and inspects telecommunications system installation**

**Agency procures, installs, and inspects telecommunications system installation**

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

**Develop Telecommunications Contract**

**CD Submission (60-76%)**

**Tenant Telecommunications Requirements**

**Additional Phases Delivery (T1, Phases, Annexes) 7.1.13.0.0.0**

**FTS**

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

**In-house**

**Agency coordinates telecommunications system design A/E**

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

**FTS procures, installs, and inspects telecommunications system installation**

**In-house**

**Agency procures, installs, and inspects telecommunications system installation**

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

**Develop Telecommunications Contract**

**LINKS**

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
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
8.0.0.0.0 Tenant Occupancy

8.2.4.0.0.0 Security Systems Installation

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc
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
Establish scope
Survey existing space
Survey furniture and equipment
Establish move-in schedule
Establish responsibilities
Responsibilities, costs, funding, and schedules established
Establish cost

Who will perform the move?

Who will pack?

GSA

Tenant

GSA provides boxes, labels, and instructions for destination

Tenants move in

GSA

Tenant

Tenant coordinates move schedule with GSA property manager

Tenant moves

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-Bridging
- CMC

8.2.6.0.0.0 Tenant Occupancy
Design/Build

8.2.6.0.0.0 Tenant Move-In