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
2.0.0.0.0 Planning
Design/Build

2.1.0.0.0.1 Pre-Project (Preliminary) Planning

Identify need/driver

Obtain agency requirements

Define Facility Master Plan 2.1.0.0.0

Define BER Requirements 2.1.3.0.0

PMP: Assemble Project Team 1.1.1.0.0.0.a

Project Team determines if D/B meets the needs of the project

Meet request in BA54 Program Small Projects Process

Can request be met in existing space?

Yes

Submit D/B construction prospectus

Is it below prospectus?

No

Yes

Prepare D/B PDS 2.5.0.0.0.0

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

Conduct programming and review benchmarks (OCA-GCCRG)

Review programming and cost estimates

Prepare Initial Draft OAs 8.1.0.0.0.0

Prepare Draft PMP 1.1.1.0.0.0.b

Initiate Preliminary Studies for Site Prospectus

No

Submit Site Prospectus

Receive authority to start site procurements

Yes

Verify site/ design funding?

No, R&A

Is it new construction?

Yes

This page applies to:

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

GSA - Public Buildings Service

Planning Page 3
1.0.0.0.0 Project Management Documents

Design/Build

1.1.0.0.0.a Project Coordination

Assemble Project Team
1.1.1.0.0.0.a

PM
1.1.1.0.0.0.b

Design Start-up Workshop
6.1.1.0.1.0

PiP

Project Website(s)
1.1.5.0.0.0

Project Coordination exists at every level

LINKS

Pre-Project (Preliminary) Planning
2.1.0.0.0.1

Feasibility
2.4.1.0.0.0.a

PDS
2.5.0.0.0.0

Site Acquisition
4.0.0.0.0.0.a

This page applies to:

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

**Design/Build**

1.1.0.0.0.a PMP: Assemble Project Team

Asset Manager assembles Project Team

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

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

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

---

**LINKS**

- Pre-Project (Preliminary) Planning 2.1.0.0.0.1
- NHPA 2.2.0.0.0.0
- NEPA 2.3.0.0.0.0
- Feasibility 2.4.1.0.0.0.a
- PDS 2.5.0.0.0.0
- Site Acquisition 4.0.0.0.0.0.a

---

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc
Existing condition assessments are required to develop scope and costs for R&A alternatives.

Project Team reviews existing information

Is additional information needed?

Yes

Obtain additional information

Incorporate assessments into FS or PDS if D/B

No

This page applies to:

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

GSA - Public Buildings Service
Local Portfolio Plans

Project Team reviews appropriate LPP

Will the agency request be satisfied within existing inventory?

Yes

Is it a capital project?

No

ABT will prioritize in small projects process (BA54)

No

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

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

ABT will prioritize in small projects process (BA54)

No

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

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

Project Team reviews current Master Plan

Would an updated Master Plan benefit the project?

No

Respond to individual requests independently

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
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.

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

Project Team consults with Regional Accessibility Officer to determine existing information

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

Is additional information needed?

Yes

Obtain additional studies

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

Use Project Consultant Task Order 6.1.0.0.0.0.a

LINKS

ADA  PBS-P100  UFAS

This page applies to:

Traditional  D/B  D/B-Bridging  CMc

GSA - Public Buildings Service 2.1.4.0.0.0 Planning Page 10
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
- No: Incorporate Fire/Life Safety work items into project scope

Use Project Consultant Task Order 6.1.0.0.0.0.a
Include in FS Scope 2.4.1.0.0.0.a
Include in PDS if D/B 2.5.0.0.0.0

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

LINKS

PBS-P100
Project Team consults with Regional IH to determine existing information

Is additional information needed?

Yes

Obtain additional information

No

Incorporate Hazardous Materials Survey information into building O&M plan and/or work items for project scope

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.

- 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

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc
2.0.0.0.0 Planning
Design/Build

2.1.6.0.0.0 Highest and Best Use Appraisal (R&A)

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

Yes

Obtain updated appraisal

No

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

Regional term contract

Use Project Consultant Task Order 6.1.0.0.0.0.a

Include in FS Scope 2.4.1.0.0.0.a

Include in PDS if D/B 2.5.0.0.0.0

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

GSA - Public Buildings Service
2.0.0.0.0 Planning

Design/Build

2.1.8.0.0.0 Safety/Security Study(ies)

Project Team consults with FPS/DHS to determine required Safety/Security Studies

Conduct preliminary threat and risk analysis

Conduct protection level assessment/ISC Survey

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

Incorporate security recommendations into project scope and budget

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

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
2.0.0.0.0 Planning
Design/Build

2.1.9.0.0.0 Energy Conservation Audit

Is this an existing building?

No → Develop energy usage targets for new construction with central office

Yes → Project Team consults with Regional Energy Coordinator to determine existing information

Is there an existing building energy audit?

No → Conduct energy audit

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

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

Include in FS Scope 2.4.1.0.10.0.a

Include in PDS if D/B 2.5.0.0.0.0

1.0.0.0.0 Project Management Documents

2.0.0.0.0 Planning

2.1.9.0.0.0 Energy Conservation Audit

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

This page applies to:

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

Energy Center of Expertise
HVAC Excellence and Specification
PBS-P100

LINKS

Existing Conditions Assessments 2.1.12.0.2.0

GSA - Public Buildings Service 2.1.9.0.0.0

Planning Page 15
2.0.0.0.0 Planning
Design/Build

2.4.1.0.0.0.b Feasibility (Continued)

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

Develop preliminary Cx Plan and required budget in FS.

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

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

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

Construction
CMa will perform services as detailed in the SOW and IAW CMA.

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

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

Links

This page applies to:

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

CMa SOW 6.3.1.0.0.0.a
CXA SOW (if apart from CMa) 6.3.1.0.0.0.b
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
2.0.0.0.0 Planning
Design/Build

2.4.1.0.0.c Feasibility: R&A

Project Team conducts study based on construction type

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

- 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

LINKS
- 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

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

2.4.1.0.0.0.d Feasibility: New Construction

- Project Team conducts study based on construction type
- New construction scope developed
- Conduct site/market survey for cost data
- Confirm housing plan
- Use benchmark or GCCRG depending on construction type (courthouse, etc.) for cost estimate
- New construction alternative has scope and budget data for analysis in Feasibility Phase

LINKS

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

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

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

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 2.1.0.0.1
NHPA 2.2.0.0.0.0
NEPA 2.3.0.0.0.0

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

4.0.0.0.0.a Site Acquisition

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

Site Investigation for FS
4.0.0.0.0.0.c

National Historic Preservation Act (NHPA) – Section 106
2.2.0.0.0.0

National Environmental Policy Act (NEPA) Compliance
2.3.0.0.0.0

Site Acquisition
4.0.0.0.0.0.a
2.0.0.0.0 Planning
Design/Build

4.0.0.0.0.b Site Investigation Tasks for FS

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
   4.0.0.0.0.b Site Investigation Tasks for FS
5.0.0.0.0 Design/Build
6.0.0.0.0 Design
7.0.0.0.0 Construction
8.0.0.0.0 Tenant Occupancy

Project Team defines need for capital project

Include in PDS if D/B 2.5.0.0.0.0

Project Team develops SOW for FS 2.4.1.0.0.0.a

Is site ACQ required for capital project?

Yes

Project Team further defines site ACQ criteria

Project Team formalizes Site Selection Team

Site Team orders special studies*

Site Team initiates preliminary NHPA and NEPA tasks

No

No further action required

DA justification

Municipality discussion documentation

Existing/Adjacent site soils report

Preliminary site development cost estimate

Real estate market survey

Real estate market appraisals

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

*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.

**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
2.0.0.0.0 Planning
Design/Build

4.0.0.0.0.c Site Investigation for FS

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

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

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.

Concurrent Activities

- NHPA
  - RHPO coordinates with SHPO. RHPO briefs Project Team on progress of consultation(s).
  - Allow 6-12 months in project schedule

- Special Studies Due Diligence
  - Regional NEPA Program Coordinator manages NEPA studies, public meetings, and mitigation measures.
  - Coordinator provides regular updates to Project Team.
  - Allow 6-15 months in project schedule

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

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

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

Concurrent Activities

- Site Investigation
  - Site Investigation - 12-18 months with FS and PDS Site Acquisition - 12-18 months from Site Directive to Closing

LINKS

- DEP&P
- GSA Guidebook I – Acquisition of Real Property
- GSA Guidebook II – Relocation of Residents and Businesses
- NEPA
- NHPA
- PBS-P100
- PMP: Assemble Project Team 1.1.0.0.0.a
- PMP 1.1.0.0.0.b
- Planning 2.0.0.0.0.0
- Relocation Planning 2.6.0.0.0.0

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

GSA Guidebook I – Acquisition of Real Property

Fact Sheet on Executive Order 13006

GSA Guidebook II – Relocation of Residents and Businesses

NEPA

PMP: Assemble Project Team 1.1.1.0.0.0.a

PMP 1.1.1.0.0.0.b

NHPA

Planning 2.0.0.0.0

Relocation Planning 2.6.0.0.0

LINKS

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc
2.0.0.0.0 Planning
Design/Build

2.3.0.0.0 NEPA Tasks for FS through Site Acquisition

Project Team assigns roles and responsibilities

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

Include in PDS if D/B 2.5.0.0.0.0

Initiate NEPA in FS

Phase I may commence at Region’s discretion

Is this a CATEX?

Yes

NHPA completed

No

Regional NEPA Program Coordinator commences EA/EIS process

Gather data/hold public meeting

Publish document

Revise EA/EIS as needed

Is this a FONSI or ROD?

FONSI - NEPA completed

ROD

Incorporate NEPA mitigation into design documents

Monitor MOA/PAs and mitigation throughout project delivery

This is an ongoing rather than an ending process

NEPA/RHPO and Site Specialists will update Project Team as needed

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

LINKS

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

NEPA

NHPA

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

Planning 2.0.0.0.0
Relocation Planning 2.6.0.0.0

This page applies to:

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

GSA - Public Buildings Service

Planning Page 27
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

**2.0.0.0.0.0 Planning**

**Design/Build**

**2.6.0.0.0.0 Relocation Planning**

**Diagram:**

- **Coordinate with RHPO and NEPA Coordinator as issues are identified.**
- **Identify potential project sites and impacts from resident/business displacement.**
- **Is there site-related relocation or swing space?**
  - **Swing space**
    - **Review housing plan and tenant needs/requirements.**
    - **Identify the phasing plan assessing unique tenant requirements.**
  - **Complete FS and prepare Site and Design Prospectus.**
    - **Or Compile site data and prepare Site Prospectus if D/B.**
    - **Update FS estimates during PDS for Construction Prospectus submission.**
    - **Review cost and schedule impacts for viable alternative sites.**
    - **Incorporate relocation issues into site cost estimate for FS.**

**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

**This page applies to:**

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

GSA - Public Buildings Service
**2.0.0.0.0 Planning**  
**Design/Build**

### 1.1.2.0.0 Commissioning Authority (Cx) (Overview)

The PPT contains WBS and detailed project tasks for Cx.

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

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

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

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

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

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

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

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

**Conduct owner training and Turnover Cx Record**

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

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

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

**Systems performance documented and accepted**

**System performance sustained**

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**LINKS**

- Building Cx Guide
- PBS-P100
- PPT

- Professional Services Estimating Tool

**This page applies to:**

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

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

Design/Build

1.1.0.0.0.b Project Management Plan (PMP)

PMP defines project delivery method and procurement strategies

PM coordinates PMP development with Project Team

Incorporate commissioning

Draft PMP submitted with Site and Design Prospectus

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

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

1.0.0.0.0 Project Management Documents

1.1.0.0.0.b Project Management Plan (PMP)

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

LINKS

Acquisition Plan FAR Part 7
Building Cx Guide
PMP Examples
PMP Template (PIP)

Feasibility 2.4.1.0.0.0.a

This page applies to:

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

GSA - Public Buildings Service

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

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

Project Team selects delivery method.

Project Team discusses procurement strategies based on selected delivery method.

- A/E
- CMc
- CxA

- GC
- CMc
- Design/Build
- Design/Build Bridging

CO prepares draft AQP for inclusion in draft PMP.

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

**LINKS**

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

**This page applies to:**

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

**GSA - Public Buildings Service**

1.1.1.0.0.0.c Planning Page 31
1.0.0.0.0 Project Management Documents
Design/Build
1.1.1.0.0.0.d Procurement Snapshot

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

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

- **A/E**
  - Project Team will determine if SS will be Two-Stage, Two-Stage Plus Design Charrette or Three-Stage with a Design Competition
  - Project Team will determine the appropriate time to bring the GC into the project. GSA has seen positive results by involving the GC during the design phase.

- **General Contractor**
  - GC should be on board during Concept development by A/E for maximum benefit to GSA
  - Project Team must prepare a comprehensive RFPs to obtain the desired quality building with a good balance for schedule and budget.

- **Construction Contractor**
  - GC will be on board during Concept development by A/E for maximum benefit to GSA
  - Project Team will determine when the CMc contract is awarded. To achieve maximum benefits of their expertise, the CMc should be hired concurrently with the A/E.

- **D/B**
  - D/B hires A/E
  - The professional services obtained through these contracts are required to insure quality, constructability and to manage budget, scope and schedule

- **Construction Contractor**
  - D/B hires A/E
  - The CMc shall be on contract concurrently with the Design A/E to maximize their input in the early stages of design

- **D/B-Bridging**
  - 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.
  - 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**
  - The D/B portion of this procurement will require extensive preparation of the D/B RFPs.
  - The level of services provided by each contractor will be determined by the Project Team as they refine the pertinent SOWs

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

<table>
<thead>
<tr>
<th>Construction Manager as Agent (CMA)</th>
<th>Commissioning Agent (CxA)</th>
<th>Art-in-Architecture (AIA)</th>
<th>Other Specialty Consultants</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Project Team determines SOW required from the CMA and the level of services required in each Phase: Design Concepts, DDs, CDs, Construction Administration, through Start-up and Turnover</em></td>
<td><em>Project Team determines the level of Cx as desired (considering timing of project and budget constraints). A complete Cx Plan is required for FY 2007 Design Starts.</em></td>
<td><em>The process is outlined in the Guide for AIA OCA Program managers are available on this sensitive program.</em></td>
<td><em>Project Team determines the need and timing.</em></td>
</tr>
<tr>
<td>Concurrent with A/E selection 6.3.1.0.0.0.a</td>
<td>Concurrent with A/E selection 6.3.1.0.0.0.b</td>
<td>Design Task Order concurrent with A/E NTP 6.1.0.0.0.0.b</td>
<td>Project Team determines the need and timing. 6.1.0.0.0.0.a</td>
</tr>
<tr>
<td>AIA Concept Design 6.7.14.0.1.0</td>
<td>AIA Fabrication Task Order 7.1.4.0.0.0</td>
<td>AIA Deliverable 7.1.12.0.0.0</td>
<td>Procurement procedures apply. Specialty Consultants may be a separate contract or a part of other services provided by CMA, CMc, GC/CC.</td>
</tr>
</tbody>
</table>

*Project Team determines if Cx is a part of the SOW for the CMA or a separate CxA contract*
### Procurement Recap:

<table>
<thead>
<tr>
<th>Section</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.1.1.0.0.0.f</td>
<td>Design/Build – Construction Contractor</td>
</tr>
<tr>
<td><strong>A/E</strong> Concepts</td>
<td>Design Development</td>
</tr>
<tr>
<td></td>
<td>Construction Documents</td>
</tr>
<tr>
<td></td>
<td>Construction Services</td>
</tr>
<tr>
<td><strong>CC</strong> Construction</td>
<td>Startup/Turnover</td>
</tr>
<tr>
<td><strong>CMa</strong></td>
<td>6.3.1.0.0.0.a</td>
</tr>
<tr>
<td><strong>CxA</strong></td>
<td>6.3.1.0.0.0.b</td>
</tr>
<tr>
<td><strong>AiA</strong></td>
<td>6.1.0.0.0.0.b</td>
</tr>
<tr>
<td>Project Consultants (as needed)</td>
<td>Design</td>
</tr>
<tr>
<td></td>
<td>Construction</td>
</tr>
<tr>
<td></td>
<td>Start-up/Turnover</td>
</tr>
<tr>
<td></td>
<td>6.1.0.0.0.0.a</td>
</tr>
</tbody>
</table>

---

**This page applies to:**

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

---

GSA - Public Buildings Service

1.1.1.0.0.0.f

Planning Page 34
1.0.0.0.0 Project Management Documents

Design/Build

1.1.3.0.0 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

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

Design/Build

1.1.3.2.0.0 Project Updates in PIP

**Project Team identifies who has editing authority**

Update at least monthly

**Updated PIP**

**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

1.1.3.1.0.0

This page applies to:

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

1.1.1.5.0.0 Project Website(s)

1.1.1.5.0.0 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

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

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

LINKS

- DrCHECKS
- GSA Document Security Requirements
- NISPOM (Classified Documents)

This is for sensitive but not classified documents
3.0.0.0.0.0 Authorization/Funding
Design/Build
2.4.4.0.0.0 Project Funding Request
3.4.5.0.0.0 Budget Authorization Act (Congressional Approval)

- Project Funding Request
- Budget Authorization Act (Congressional Approval)

Flowchart:
1. Region obtains funding, commences formal site ACQ process
2. Region submits allowance request to Central Office
3. Central Office reviews submissions
4. Central Office runs expert choice model and prioritizes projects
5. Central Office submits site prospectus to OMB
6. Congress approves budget for site
7. Project Team commences work on PDS for D/B 2.5.0.0.0.0
8. OCA hosts Courthouse Orientation and Design Start Workshops 6.1.0.0.0
9. OCA issues project directive
10. This includes House and Senate authorization and appropriation
11. OMB passes back
12. Approved
13. OMB includes site prospectus in President’s budget
14. Not approved
15. Project may be resubmitted in a future FY

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

GSA - Public Buildings Service
2.4.4.0.0.0
Planning Page 38
1.0.0.0.0 Project Management Documents
Design/Build

6.1.0.1.0 Courthouse Orientation and Design Start Workshop

OCA issues site and design directive

Regions formally appoint PM (if not previously appointed)

PMs invited to workshops sponsored by the OCA

PM assembles Project Team (Transition is made from ABT)

Present PMP to OCA representatives and GSA peers (PMs)

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

PMs update PMP as needed

LINKS

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc
3.4.0.0.0.0 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.
- OMB includes D/B prospectus in President’s budget.

Region obtains funding and awards D/B contract.
Region submits allowance request to Central Office.
Central Office obtains funding.
OCA hosts construction start workshop.
Congress approves construction budget.

This includes House and Senate authorization and appropriation.

Project to be resubmitted in future FY.
Not approved → OMB pass back → Approved.
6.0.0.0.0 Design
Design/Build
4.1.0.0.0 Site Selection/Technical Studies: NHPA and NEPA Process (Overview)

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

Concurrent

Project Team receives site directive from OCA

Concurrent

Project Team confirms roles and responsibilities

Project Team reviews site selection criteria and timeline for tasks to be completed

NHPA 2.2.0.0.0.0

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

Site Selection 4.0.0.0.0.b

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

NEPA 2.3.0.0.0.0

Regional NEPA Coordinator proceeds on ESA

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

Site Team orders technical studies and updates the Project Team accordingly

Use Project Consultant Task Order 6.1.0.0.0.a

Design documents reflect mitigating measures for NHPA or NEPA as appropriate

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

ROD or FONSI concludes NEPA consultation process

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

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

Determine DA and advertise for sites

Evaluate sites

Select top 3 sites

Announce site selected

Make site offers

Clear title

Site Selection Team completes formal Site Selection Process

NHPA/NEPA

Are there site concerns?

Yes

Conduct ESA Phase 2 sampling

Complete NEPA and NHPA

Is this ROD or FONSI?

ROD

Develop costs to clean property

Incorporate mitigation into design documents

Acquire site

No

ESA completed

Contract for appraisal

Review draft appraisal

Complete survey

Review and approve final appraisal

Deduct cost to clean property

Determine final property valuation

Appraisal and GeoTech Studies

Construction Award cannot occur without clear title to site

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

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

LINKS

GSA Guidebook I – Acquisition of Real Property

Relocation Planning 2.6.0.0.0

This page applies to:

Traditional D/B D/B-Bridging CMc

6.0.0.0.0 Design
Design/Build

4.2.0.0.0.0 Site Acquisition (Overview)
6.0.0.0.0.0 Design
Design/Build
6.2.0.0.0.0.a A/E Procurement (Overview)

1.0.0.0.0.0 Project
Management
Documents
2.0.0.0.0.0 Planning
3.0.0.0.0.0 Authorization/
Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design/Build
6.0.0.0.0.0 Design
6.2.0.0.0.0.a A/E
Procurement
(Overview)
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant
Occupancy

OCA issues Site
and Design
Directive

Develop A/E
SOW for D/B
RFP
6.2.1.0.0.0

Prepare
Source
Selection
Plan
6.6.4.0.0.0

Issue RFQ

Complete Contract
Evaluation

Award Project
Consultant
Task Order
6.1.0.0.0.0.a

LINKS

FS
PDS

PMP Reference
Advertise for
D/B Services
6.6.5.0.0.0.a

This page applies to:

GSA - Public Buildings Service
6.2.0.0.0.0.a
6.0.0.0.0 Design
Design/Build

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

Begin A/E procurement for new contracts

Verify funding

Review prospectus planning documents

Prepare AQP

Develop project-specific SOW

Prepare IGE

Prepare SSP

IDIQ?

Make selection

Issue RFP

Receive proposal

Evaluate/prepare/pre-negotiation objectives

Award contract

Complete contract evaluation

Negotiate/prepare/pre-negotiation memorandum

When the decision has been made to use existing contracts such as IDIQ the SSP is not necessary

No

Yes

LINKS

This page applies to:

<table>
<thead>
<tr>
<th>FS</th>
<th>PDS</th>
<th>PMP Reference</th>
</tr>
</thead>
</table>

GSA - Public Buildings Service

6.2.0.0.0.b
6.2.1.0.0.0 A/E Services Scope of Work Overview (RFP Preparation)

Project Team reviews prospectus, FS, BER, etc., to determine SOW for A/E

Project Team confirms project goals and objectives with all stakeholders

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

Project Team confirms budget, OA issues, and clarifies project delivery method in A/E SOW

Comments are incorporated into SOW as appropriate

Project Team finalizes SOW

Project Team prepares independent GE for A/E fee

LINKS

A/E SOWs | DEP&P | HVAC Excellence
---|---|---
LEED | PBS-P100 | Pricing Implementation for Project Management
Tenant Requirements Guidelines | WBDG | Concept Design 6.7.12.2.0.0

This page applies to:

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

GSA - Public Buildings Service

6.2.1.0.0.0
CMa Task Order/CxA
Task Order 6.3.2.0.0.0

CMa Scope of Work

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.

Prepare SOW

Confirm project goals and objectives

Review prospectus, FS, BER, etc.

Confirm construction budgets

Building Cx Guide

Project Team develops CMa SOW

CMAA - CM Standards of Practice

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
3.0.0.0.0.0 Authorization/Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design/Build
6.0.0.0.0.0 Design
6.3.1.0.0.0.a CMa Scope of Work
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy

This page applies to:

Traditional   D/B   D/B-Bridging   CMc

GSA - Public Buildings Service
6.0.0.0.0 Design
Design/Build

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

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

Project Team reviews PMP strategy and required Cx services

Project Team confirms project goals and objectives with all stakeholders

Project Team prepares draft SOW and seeks comments from all members and 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.
6.0.0.0.0 Design
Design/Build
6.3.2.0.0.0 CMa Task Order/ CxA Task Order

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

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

The Project Team reviews PMP and validates level of services required from CMa.

Begin CMa procurement for new contracts.

Verify funding.

Confirm AQP.

Develop project-specific SOW.

Prepare fee estimate.

Review Cx Plan.

Review Prospectus Planning Documents.

CMa Task Order/ Cx Task Order.

When the decision has been made to use existing contracts such as IDIQ, the SSP may not be necessary.

The decision to use IDIQ is made after the project team has reviewed the PMP and determined the level of services required from CMa.

Prepare SSP

IDIQ?

Yes

Make selection

Issue RFP

Award contract

Receive proposal

Complete contract evaluation

Evaluate/prepare pre-negotiation objectives

Negotiate/prepare pre-negotiation memorandum

No

LINKS

This page applies to:

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

No

Yes

Must have D/B A/E’s Lead Designer under contract
6.0.0.0.0 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

This page applies to:

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

GSA - Public Buildings Service
6.0.0.0.0 Design
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?

No

Review with legal counsel if necessary

Yes

Revise and resubmit

Issue SSP

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

This page applies to:

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

**LINKS**

- D/B Source Selection Plan 6.6.4.0.0.0
- Design Development (Overview) 6.8.0.0.0.0

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

GSA - Public Buildings Service
6.6.5.0.0.0.a
6.6.5.0.0.0.b D/B Pre-Proposal Conference and Addenda

1. Task 1: Project Management Documents
2. Task 2: Planning
3. Task 3: Authorization/Funding
4. Task 4: Site Acquisition
5. Task 5: Design/Build
6.6.5.0.0.0.b D/B Pre-Proposal Conference and Addenda
7. Task 7: Construction
8. Task 8: Tenant Occupancy

The Diagram:
- Project Team announces date, place, and time for pre-proposal conference
- Set up tour(s) (if applicable)
- Develop agenda
- Conduct meeting and tour
- Provide minutes/sign-in sheet to all attendees
- Coordinate addenda distribution of hard copies following GSA document security policy
- Assemble addenda
- Revise proposal due date if necessary
- Develop response including narrative sketches, specifications, etc.
- Receive clarification comments
- Is another pre-proposal conference necessary?

Issue/post addenda to FED BIZ OPS

Links:
- GSA Document Security Requirement
- Sample Agenda
- D/B Procurement
- Advertisement for D/B Services

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

D/B Submission (Phase I) 6.6.6.0.0.0

GSA - Public Buildings Service 6.6.5.0.0.0.b Design Page 14
**6.0.0.0.0 Design**

**Design/Build**

**6.6.8.0.0 D/B Submission Phase (BFAO) (Phase II)**

(Team Interviews) and **6.6.9.0.0 D/B Evaluations/Selection (Phase II)**

---

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

6.6.8.0.0.0 D/B Submission Phase (BFAO) (Phase II) (Team Interviews)

6.6.9.0.0.0 D/B Evaluations/Selection (Phase II)

7.0.0.0.0.0 Construction

8.0.0.0.0.0 Tenant Occupancy

---

**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

---

**Links**

- Sample RFP
- D/B Procurement (Overview) 6.6.0.0.0.0
- D/B Submission (Phase I) 6.6.6.0.0.0

---

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc
6.7.7.0.0 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**
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.

Project Team may include GC if they are on board

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

A/E prepares/distributes interim submission

Project Team review submissions and submit comments

A/E responds to review comments

A/E incorporates review comments into next submission

Project Team selects final Concept Design

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

LINKS

A/E SOW
DEP&P
Design Review Checklist
DrCHECKS
PBS-P100 - Appendix
Submission Checklist

This page applies to:

Traditional
D/B
D/B-Bridging
CMC

GSA - Public Buildings Service
6.7.6.3.0.0
Design Page 18
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

**LINKS**

- GSA Guidebook I – Acquisition of Real Property
- GSA Guidebook II – Relocation of Residents and Businesses
- NEPA
- NHPA
- PBS-P100
- Project Planning Guide

---

**THIS PAGE APPLIES TO:**

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

---

**Final Concept Presentation to Commissioner**

6.7.14.0.0
6.7.14.0.0 Final Concept Presentation to the Commissioner

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
6.7.14.0.0.0 Final Concept Presentation to the Commissioner
7.0.0.0.0 Construction
8.0.0.0.0 Tenant Occupancy

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

Coordinate meeting logistics

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.

OCA independent estimate not required

Conduct Presentation

LINKS

PBS-P100 Concept Design Review 6.7.6.3.0.0

This page applies to:

Traditional ✓ D/B ✓ D/B-Bridging CMc
Receive approval memorandum from OCA

Request allowance from central office

Issue award and publish award announcement

Initiate security clearance process of contractor personnel as required

Verify bonding capacity

Receive, review, and approve

Award D/B Contract

Issue NTP

D/B commences Design Development (Overview) 6.8.0.0.0.0
Art-in-Architecture Concept Design

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
6.7.14.0.1.0 Art-in-Architecture Concept Design

Artistic meeting

Artist prepares concept design(s)

Conduct internal GSA review, as necessary

Present final concept to art panel

Art panel approves concept?

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

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

Peer review may occur in this step

No

Yes

This page applies to:

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

GSA - Public Buildings Service

6.7.14.0.1.0

Design Page 22
6.0.0.0.0 Design
Design/Build
6.6.14.0.0 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
7.1.2.0.0.0

Determine best option

Construction Kick-off 7.1.2.0.0.0

Conduct Partnering Session 7.1.3.0.0.0.a

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

Conduct Construction Kick-off Meeting 7.1.2.0.0.0

Conduct Partnering Session 7.1.3.0.0.0.a

LINKS

Sample NTP Letter

This page applies to:

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

GSA - Public Buildings Service 6.6.14.0.0.0 Design Page 23
7.0.0.0.0 Construction
Design/Build

7.1.2.0.0.0 Construction Kick-off Meeting

7.1.2.0.0.0 Construction Kick-off Meeting

- Project Team determines location, date, and time of meeting
- Invite stakeholders
- Project Team develops agenda
- Conduct meeting
- CMa issues meeting minutes
- Discuss Pros/Cons of Concurrent Kick-off and Partnering Meetings 7.1.3.0.0.0.a

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

Project Team assigns roles/responsibilities in the PMP. Most teams will utilize their CMa for meeting coordination, recordation, action plans.

LINKS

Sample Kick-off Meeting Agenda  Suggested Stakeholders Invitation List

PMP 1.1.1.0.0.0.b

This page applies to:

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

GSA - Public Buildings Service  7.1.2.0.0.0  Design Page 24
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.

The Project Team discusses upcoming partnering session.

The Project Team asks for A/E’s input and if they believe a “partnering” consultant would add value to the meeting and enhance meetings.

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

Selection process: Consultant or in-house?

In-house

Consultant

Issue a task order for Project Consultant 6.1.0.0.0.0.a

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
**7.0.0.0.0 Construction**

**Design/Build**

**7.1.3.0.0.0.b Partnering Session: Timing Benefits and Drawbacks**

---

**Option A: Holding partnering concurrently with kick-off:**

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

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

**Option B: Delaying partnering until after kick-off:**

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

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

---

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

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

No

Construction Administration 7.1.6.0.0.0.a

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)

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

AIA Concept
6.7.14.0.1.0

Design Development
6.8.0.0.0.1

GSA - Public Buildings Service
6.8.0.0.0
Design Page 28
**6.0.0.0.0 Design**

**Design/Build**

**6.8.0.0.0.1 Design Development (Process)**

- **Project Management Documents**
  - 1.0.0.0.0
  - 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
  - 6.8.0.0.0.1 Design Development (Process)
  - 7.0.0.0.0 Construction
  - 8.0.0.0.0 Tenant Occupancy

**Process Flow Diagram**

1. **Commence AIA contract concurrent with DD Program Review 6.1.0.0.0.b**
   - Partnering Session
   - Submit baseline schedule
2. **Prepare/ Distribute Interim DD Submission(s) 6.8.5.0.0.0**
   - Conduct interim submission(s) review
3. **Is another interim submission required?**
   - Yes: Prepare final DD submission
   - No: Review and issue comments
4. **Participate in DD VE Workshop**
5. **Evaluate and Incorporate VE Recommendations**
6. **Independent OCA PBS-P100 Review and Estimate 6.8.11.0.0.0**
   - Validate funding sources
7. **Review TI Status with customer**
8. **OA Update 6.1.3.0.0**
9. **Conduct DD Program Review Workshop as determined by Project Team 6.8.1.0.0.0**
10. **Review Tenant Telecommunication Requirements**
11. **Update PDRI**
12. **Verify budget compliance by performing IGE**
13. **Issue comments to architect**
14. **D/B verifies budget compliance (Shell and TI)**
15. **Notify agency if cost estimates have exceeded TI budget. Request additional RWA funds or redesign**
16. **These comments generally will be addressed in the CD phase**
17. **Conduct National CAD/CIFM Standards Completeness Review**
18. **Systems Selection and Analyses 6.8.2.0.0.0**
19. **Owners Code Reviews**
20. **Review Tenant Telecommunication Requirements**
21. **Collect RWAs if necessary**
22. **Confirm pricing policy implementation including document structure for pricing and budget. Collect RWAs, if necessary.**

**Links**

- National CAD/CIFM Standards
- OA Tool
- PBS-P100
- PDRI
- Utility Rebate Program Review 6.8.0.0.0.2
- OA (Accepted Draft): During Construction 6.1.1.3.1.0

**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.

**6.8.1.0.0.b**

**Is a workshop needed?**

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

- **No**
  - Based on the deliverables from the workshop or tenant meetings, proceed with DDs

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

---

DD Systems Selection Analyses

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.

Must be aligned with LEED goals

DCA HVAC peer review

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

LINKS
- HVAC Excellence
- PBS-P100
- PMP Reference

GSA - Public Buildings Service
6.0.0.0.0 Design
Design/Build

6.8.5.0.0 DD Submission (35%)

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

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

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

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

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

A/E will deliver the 35% DD submission as provided in the A/E SOW.

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.

LINKS

PBS-P100 PMP 1.1.1.0.0.b

This page applies to:

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

GSA - Public Buildings Service 6.8.9.0.0.0 Design Page 34
6.0.0.0.0 Design
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.

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

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

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

OCA will review and comment within 10 working days

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

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

Final approvals will be issued by the PM/CO
6.0.0.0.0 Design
Design/Build
6.9.0.0.0 Construction 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
6.9.0.0.0 Construction
Documents
7.0.0.0.0 Construction
8.0.0.0.0 Tenant
Occupancy

Project Team issues NTP to
A/E for construction
documents

Project Team determines needs for
CD Program Review
Workshops (CD start
and 90%)
6.9.3.0.0.0

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

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

Coordinate CD Review, CM's CD
Review/Estimate; Verify T.I. estimate if
applicable, Validate funding sources,
National CAD/CIFM Standards
Compliance Review, Quality Assurance
Plan Requirements, Security Design
Requirements

Project Team reviews and
issues comments

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

CMa conducts
independent verification
of review comments and
updates IGE

Prepare PBS CAD
Library Submission

OCA performs
independent
review and IGE
(Optional)
6.7.13.0.0.0

Verify budget compliance by
performing IGE

Coordinate with AIA
Fabrication and Installation

OA Update
8.1.1.3.0.0

LINKS

National CAD/
CIFM Standards
PBS-P100

PBS Pricing
Desk Guide
VE Guide

This page applies to:

Traditional D/B D/B-Bridging CMc

CD
Program
Review
Workshop
(CD Start)
6.9.3.0.0.0

GSA - Public Buildings Service
Design Page 36
6.0.0.0.0 Design
Design/Build

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

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

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

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?

No

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

No

OCA completes compliance review, scope review and IGE

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

Is the program within scope and budget?

OCA provides feedback to regions for the 100% CD submission

Update OAs as needed 8.1.1.3.0.0

CMa's CD Review/Estimate (100% CDs) 6.7.12.0.0.0
CMa and Project Team reconcile scope or costs as needed

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

A/E updates checklists as needed

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

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

Is the program within scope and budget?

Yes

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

No

Update OAs as needed 8.1.1.3.0.0

CxA review as specified in Cx Plan

CMa's CD Review/Estimate (100% CDs)
6.10.16.0.0 Professional Services Task Orders (Construction)

Determine professional services needed for construction administration

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

Exercise A/E/CM options and new contracts as necessary
7.0.0.0.0 Construction
Design/Build

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
7.0.0.0.0 Construction
Design/Build

7.0.0.0.1 Construction Administration to Substantial Completion

Construction Administration
7.1.6.0.0.0.a

Construction Excellence Peer Review
7.1.8.0.0.0

AIA Deliverable
7.1.12.0.0.0

Additional Phases Delivery
7.1.13.0.0.0

Turnover Documents
7.1.14.0.0.0

Final Inspections
7.1.14.1.0.0.a

Occupancy Permit
7.1.16.0.0.0

Substantial Completion Certification
7.1.15.0.0.0.a

This page applies to:

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

7.1.6.0.0.0.a Construction Administration

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
- CMa manages safety plan and advises Project Team as deemed appropriate: 7.1.6.0.0.1.a
- Project Team conducts regularly scheduled “progress” meetings. Project updates are provided by disciplines as needed. Special meetings may be called at the discretion of the Project Team.

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

Project Team implements and monitors safety plan

Project Team receives reports

Project Team reviews project-specific Safety Management Plan

Accept plan?

Yes

No

Provide feedback to contractor
7.1.6.0.0.1.b Construction Administration: Project Cost Management

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 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
7.1.6.0.0.1.c Requests for Information (RFI)

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

RFI process will be adjusted to meet project needs and may be different for D/B
A/E, C Ma, or ePM depending on the chosen process by Project Team
A/E, C Ma, GSA, or customer depending on responsible party
Determine if response is a change order

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

GSA - Public Buildings Service

Construction Administration 7.1.6.0.0.0.a

Construction Page 7
7.1.6.2.0.0 Construction
Design/Build

Construction Schedules

GC/CC contractor submits preliminary CPM schedule

Review schedule

Is preliminary schedule accepted?

Yes

GC/CC submits baseline schedule

Project Team reviews baseline schedule

Is baseline schedule approved?

Yes

Project Team establishes process for monthly CPM schedule updates and approvals

Construction payments must be based on monthly 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

Provide feedback to GC/CC

Provide feedback to contractor

No

No
8.0.0.0.0 Tenant Occupancy

7.0.0.0.0 Construction
Design/Build

7.1.6.4.0.0 Submittal Schedule/Log/Submissions

GC/CC contractor prepares and delivers submittal schedule

Review submittal schedule

Provide feedback to contractor

Is submittal schedule accepted?

Yes

Project Team establishes process to track submittals

Manage and update submittal log via monthly/weekly scheduled meetings

Typically managed by CMa

Schedule reviewed by A/E, GSA, and CMa

Refer to specifications for submission requirements

No

LINKS

Sample Submittal Schedule

This page applies to:

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

GSA - Public Buildings Service 7.1.6.4.0.0 Construction Page 9
7.0.0.0.0 Construction
Design/Build

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

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
3.0.0.0.0.0 Authorization/Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design/Build
6.0.0.0.0.0 Design
7.0.0.0.0.0 Construction
7.1.2.0.1.2 Quality Assurance Control Plan/Reports
(QAQC Review Process)
8.0.0.0.0.0 Tenant Occupancy

GC/CC submits project specific QAQC Plan including inspection and report schedules

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

GSA, A/E, and CMA review QAQC Plan

Is QAQC Plan accepted?

Yes

No

Provide feedback to GC/CC

Contractor provides progress reports via regularly scheduled meetings

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

7.1.2.0.1.2 Quality Assurance Control Plan/Reports
(QAQC Review Process)

This page applies to:

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

Building Cx Guide  Cx Plan  PBS-P100

PPT  Inspections and Testing Schedule  7.1.6.5.0.0

Construction Administration 7.1.6.0.0.0.a

GSA - Public Buildings Service

7.1.2.0.1.2

Construction Page 10
7.0.0.0.0 Construction
Design/Build

7.1.6.5.0.0 Inspections and Testing Schedule

- GC/CC coordinates testing schedule

Do specifications require GC/CC or GSA testing?

- GC/CC inspects and tests
- GSA inspects and tests

Coordinate testing schedule with CMa and tenants

Project Team coordinates testing schedule with GC/CC and tenants

Conduct test

Provide feedback to contractor; GC/CC correct deficiencies

- 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

Evaluate results

No

Proceed and file report

Accept?

Yes

No

LINKS

This page applies to:

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

Evaluate results

Proceed and document

Accept?

Provide feedback to contractor

Refer to project specifications for requirements

Yes

No

Yes

No

Tradicional ☑️ D/B ☑️ D/B-Bridging ☑️ CMc

This page applies to:
7.1.6.1.1.1 Project Web-Cam

Will project use Web-cam?

Yes

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

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

Coordinate security

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

Implement

Typically managed by CMa

No

Don't install

This page applies to:

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

7.1.6.8.0.0 GC/CC Contract Modifications

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 fragment

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

Is the request valid?

Yes

Obtain necessary funding documents

Issue RFP

GC/CC responds to RFP

CMa analyzes request proposal

Negotiate

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

No

Deny request

Contingency funds may be used only for errors or omissions!

7.1.6.8.0.0 GC/CC Contract Modifications

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.

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

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

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

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

The PM and CO typically complete the evaluations

Go to the NIH Website and complete the evaluation form

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

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.

Project Team discusses need for a follow-up Partnering Session

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

Is follow-up Partnering Session needed?

No further action required

Plan Partnering Session

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

Selection Process: consultant or in-house?

Consultant

Issue a Task Order for Specialty Consultant 6.1.0.0.0.0.a

or

CMA may hire consultant as provided in SOW

In-house Facilitator

Project Team identifies in-house facilitator and determines availability

Project Team invites stakeholders and develops agenda

Project Team conducts Partnering Meeting

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

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
7.1.7.0.0.0 CII Benchmarking
8.0.0.0.0.0 Tenant Occupancy

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

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

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

Project Team coordinates with OCA

Is peer review required at 15% completion?

Yes

No

OCA requests and Project Team completes survey form

OCA coordinates schedule and participates in peer review

Peer review team prepares report

Project team develops action plan

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

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

List of OCA Construction Excellence Council

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

LINKS

AIA Fabrication Task Order 7.1.4.0.0.0

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc
7.1.13.0.0.0 Additional Phases Delivery (TI, Phases, Annexes)

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
7.1.13.0.0.0 Additional Phases Delivery (TI, Phases, Annexes)
8.0.0.0.0.0 Tenant Occupancy

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

CPM schedule examples

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

Project Team receives turnover documents

- O&M Manuals Submittal 7.14.3.0.0
- Warranties and Certifications 7.14.4.0.0
- Material Samples, Attic Stock and Spare Parts 7.14.6.0.0
- Contractor Record Drawings 7.14.7.0.0

Review and accept turnover documents

Links:

- Substantial Completion Certificate: Final Cleaning 7.15.0.0.0.b
- Substantial Completion Certificate: Final Completion 7.15.0.0.0.c

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc
7.1.14.3.0.0 O&M Manuals Submittal

1.1.1.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
3.0.0.0.0.0 Authorization/ Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design/Build
6.0.0.0.0.0 Design
7.0.0.0.0.0 Construction
7.1.14.3.0.0 O&M Manuals Submittal
8.0.0.0.0.0 Tenant Occupancy

LINKS

Cx Plan
Substantial Completion Certification 7.1.15.0.0.0.a
Substantial Completion Certificate: Final Completion 7.1.15.0.0.0.c
Occupancy Permit 7.1.16.0.0.0

This page applies to:

☑ Traditional ☐ D/B ☐ D/B-Bridge ☐ CMc

7.0.0.0.0.0 Construction
Design/Build
7.1.14.3.0.0 O&M Manuals Submittal

Project Team reviews PMP, Cx Plan, and implementation strategies. The team will look to the CMa or CxA to manage the submittal of O&M Manuals. 1.1.1.0.0.0.b

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

GSA - Public Buildings Service
7.1.14.3.0.0
Construction Page 22
7.0.0.0.0 Construction
Design/Build

7.1.14.4.0.0 Warranties and Certifications

- Using PMP, CMA/CxA establishes list of warranties and certifications
- Determine requirements for start date of warranties and certifications
- Identify who will prepare and receive warranties and certifications
- Prepare warranties and certifications
- Submit warranties and certifications
- Review warranties and certifications and report status to Project Team
- Project Team reviews and comments
- Pass or Fail?
  - Pass
  - Fail → Withhold percentage of payment

- Contract Record Drawings 7.1.14.7.0.0

LINKS

Cx Plan
PMP Reference

Submittal Schedule/Logs/Submissions 7.1.6.4.0.0

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

Yes

Complete

No

Withhold percentage of payment

Property Manager is key player
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-buils of contractor record drawings

Project Team reviews and comments

Pass?

No → Withhold percentage of payment

Yes →

A/E or Contractor?

Contractor

A/E

Prepare record documents from contractor redlines 7.2.1.0.0.0

Complete and distribute as directed by Project Team

LINKS

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

This page applies to:

 días Traditional D/B D/B-Bridging CMc

GSA - Public Buildings Service

Construction Administration

7.1.14.7.0.0 Contractor Record Drawings

7.0.0.0.0.0 Construction

Design/Build
7.0.0.0.0 Construction
Design/Build

7.1.14.2.0.0 Systems Start-Up and Testing (Commissioning)

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning Authorization/Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design/Build
6.0.0.0.0.0 Design
7.0.0.0.0.0 Construction
7.1.14.2.0.0 Systems Start-Up and Testing (Commissioning)
8.0.0.0.0.0 Tenant Occupancy

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

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

Schedule start-up and testing

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

Identify special testing equipment

Develop format for start-up and testing

Perform start-up and testing

Develop punch lists and send to contractor

Contractor takes corrective action

Re-test

Substantial Completion Certification 7.1.15.0.0.0.a

Pass?

CMa SOW – 6.3.1.0.0.0.a

CxS SOW (if apart from CMa) – 6.3.1.0.0.0.b

Use O&M Manuals

LINKS

Cx Plan
PMP Reference
Quality Control Plan 7.1.2.0.1.2

Submittal Schedule/Log/Submissions 7.1.6.4.0.0
Inspections and Testing Schedule 7.1.6.5.0.0
Special Testing/Mock-up Plans/Reports 7.1.6.6.0.0

Turnover Documents 7.1.14.0.0.0
Substantial Completion Certificate: Final Completion 7.1.15.0.0.0.c
Occupancy Permit 7.1.16.0.0.0

This page applies to:

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

GSA - Public Buildings Service
7.1.14.2.0.0
Construction Page 26
7.0.0.0.0 Construction
Design/Build

7.1.14.5.0.0 Property Management Training

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

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

Document the training in digital format and save to the EMS

Develop format for training (digital, online, video)

Identify who will receive training

Schedule training and coordinate with Project Team

Perform training

Project Team reviews and comments

Pass?

Withhold percentage of payment

Yes

Complete

No

This page applies to:

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

7.150.0.0.b Substantial Completion Certificate: Final Cleaning

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
7.150.0.0.b Substantial Completion Certificate: Final Cleaning
8.0.0.0.0 Tenant Occupancy

Punch Lists 7.14.1.0.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

LINKS

Substantial Completion Certificate: Final Completion 7.150.0.0.c

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

Make Corrections

Return to pass/fail

No

Other/ environmental parties

Determine security testing responsibilities and request final testing

FPS/USMS Passes?

Yes

Food Service will require outside permits

This page applies to:

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

Substantial Completion Certification 7.1.15.0.0.0.a

GSA - Public Buildings Service

Substantial Completion Certification 7.1.15.0.0.0.a

Construction Page 30
7.0.0.0.0 Construction
Design/Build

7.1.14.1.0.0.a Final Inspections

CMa/CxA performs the following duties as directed by the Project Team (PMP) 1.1.1.0.0.0.b

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?

Start closeout process

Develop lists and send to contractor

LINKS

PMP Reference

Turnover Documents 7.1.14.0.0.0

Substantial Completion Certificate: Final Completion 7.1.15.0.0.0.c

This page applies to:

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

GSA - Public Buildings Service 7.1.14.1.0.0.a

Construction Page 31
CMa/CxA performs duties as directed by the Project Team (PMP)

Schedule inspections

Project Team identifies who will conduct inspections

Develop format for punch lists inspections

Perform inspections

Develop lists and send to contractor

Contractor takes corrective action

Reinspect

Develop final punch list

Resolve disputed items

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

Yes

No

Other forces correct?

Contractor corrects

LINKS

Turnover Documents 7.1.14.0.0.0
Final Inspections 7.1.14.1.0.0.a

Substantial Completion Certificate: Final Completion 7.1.15.0.0.0.c
Occupancy Permit 7.1.16.0.0.0

This page applies to:

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

GSA - Public Buildings Service 7.1.14.1.0.0.b Construction Page 32
7.0.0.0.0 Construction
Design/Build

7.1.15.0.0.0.c Substantial Completion Certificate: Final Completion

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

Contractor completes all tasks

Receive turnover documents

Complete and accept final inspections

Receive occupancy permits

Receive and complete substantial completion certification

Complete final cleaning

Pass?

Yes

No

Issue Substantial Completion Certification 7.1.15.0.0.0.a

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

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

- Maintenance and Cleaning Contracts (GC Option) 8.3.4.0.1.2
- A/E Record Documents 7.2.1.0.0.0
- Updated PBS CAD Library Submission 7.2.2.0.0.0
- Contract Closeout (GC/CC) 7.2.3.1.0.0
- Project Management Closeout 7.2.3.2.1.0
- Financial Closeout 7.2.3.2.0.0
- Dedication Ceremony Documents 7.2.4.0.0.0
- Project Awards (LEED, EnergyStar, AIA, PM, etc.) 7.2.5.0.0.0

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

Project Team defines scope of maintenance and cleaning

Coordinate with Property Manager on pending turnover date

Property Manager procures and places award

Project Team coordinates maintenance and cleaning schedule

Phase out GC/phase in maintenance contract

Cleaning contractor obtains security clearance for maintenance contract personnel

Perform regularly scheduled maintenance and cleaning IAW contract

LINKS

PMP Reference

O&M Manuals Submittal 7.1.14.3.0.0

Warranties and Certifications 7.1.14.4.0.0

Property Management Training 7.1.14.5.0.0

Substantial Completion Certificate: Final Cleaning 7.1.15.0.0.0.b

Substantial Completion Certificate: Final Completion 7.1.15.0.0.0.c

This page applies to:

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

QAQC should also address A/E Record Documents

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc
7.2.0.0.0 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

QA/QC should address CAD Library submissions

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

Closeout (Admin) 7.2.0.0.0
**7.0.0.0.0 Construction**

**Design/Build**

**7.2.4.0.0 Dedication Ceremony Documents**

- **Project Team contacts Customer Service/Marketing to advise of project completion**
- **Marketing/Customer Service Staff will perform/coordinate the following tasks for planning and executing ceremony documents as well as managing all phases of the Dedication Ceremony**
- **Contact marketing department to notify of completion**
- **Contact appropriate parties to establish ceremony date**
- **Establish ceremony committee**
- **Identify source of funds**
- **Identify number of attendees to schedule facility**
- **Develop invitation list**
- **Produce fact sheets for press releases**
- **Identify stage/dais size and procure**
- **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**

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**This page applies to:**

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

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GSA - Public Buildings Service 7.2.4.0.0.0 Construction Page 38
7.2.5.0.0.0 Project Awards (LEED, EnergyStar, AiA, PM, etc.)

Project Team provides information for award criteria

- LEED
  - Cx Plan/Report
- EnergyStar
- AiA
  - A/E
- PM
- GSA Design Awards (Biennial)
1. Project Management
   Documents
2. Planning
3. Authorization/Funding
4. Site Acquisition
5. Design/Build
6. Design
7. Construction
   Closeout (GC/CC)
8. Tenant Occupancy

---

**Process Flowchart**

- Project Team verifies Substantial Completion Certificate: Final Cleaning
- Compete final cleaning
- Verify completion of contract(s)
- CMc submits final report
- Identify scope of claim
- Determine resolution process (negotiation, ADR, GSBCA, court of claims)
- CO receives final invoice and Release of Claims (GSA Form 1142)

---

**Links**

- Release of Claim (GSA Form 1142)
- Substantial Completion Certificate: Final Completion

---

**This page applies to:**

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

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

**Some of these processes/tasks are concurrent**

**LINKS**

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

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

---

GSA - Public Buildings Service 7.2.3.2.1.0
Project Team completes tasks for financial closeout

Close out RWAs if open

Return balance of funds to appropriate parties

Is there interest due?

Concurrent

Retain for possible interest payments from final invoice

Close out items from GSA Financial System

Process all final payments

Pay interest

Pay

Project Team compiles all project cost data and completes Real Property Acquisition Advice (GSA Form 1011)
7.0.0.0.0 Construction
Design/Build

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

LINKS

This page applies to:

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

GSA - Public Buildings Service 8.1.3.0.1.0 Construction Page 43
8.0.0.0.0 Tenant Occupancy

Design/Build

8.0.0.0.0 Tenant Occupancy

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

GSA - Public Buildings Service

8.0.0.0.0

Tenant Occupancy Page 1
8.0.0.0.0 Tenant Occupancy
Design/Build

8.1.0.0.0.0 Occupancy Agreements and RENT (Overview)

Begin preparation of OA

New or revised tenant space

Verify agency requirements

Initial Draft OA based on FS estimates 8.1.1.2.2.0.a

Update Draft OA based on PDS 8.1.1.3.0.0

Updated Draft OA based on Concept Design

Update Draft OA during DD 8.1.1.3.1.0

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

Update Draft OA prior to construction award 8.1.1.2.2.0.b

Final Reconcile OA 8.1.1.5.0.0

Archive as-built CAD Drawings 8.1.2.0.0.0

Initial RENT Start 8.1.3.0.0.0

Final OA 8.1.1.5.0.1

Real Property Acquisition Advice (GSA Form 1011) 8.1.3.0.1.0

OA updates are included at each major planning and construction design milestone

Limited Scope

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

No OA required

LIMITS

PBS Pricing Desk Guide
Pricing Implementation for Project Management

PDS 2.5.0.0.0.0
D/B Procurement 6.6.0.0.0.0
Final Concept Presentation to the Commissioner 6.7.14.0.0.0

Design Development (Overview) 8.8.0.0.0.0
Construction Documents 6.9.0.0.0.0
Construction Administration to Substantial Completion 7.0.0.0.0.1

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

GSA - Public Buildings Service 8.1.0.0.0.0 Tenant Occupancy Page 2
Prepare OA using FS estimate

Transmit OA to agency for review

Does agency agree?

Yes → Signed OA

No → Review requirements used to develop cost estimate 2.4.1.0.0.0.a

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

8.0.0.0.0 Tenant Occupancy
Design/Build

8.1.1.2.0.a Occupancy Agreement Planning Phase
(Initial Draft)
1.0.0.0.0 Project Management Documents
2.0.0.0.0 Planning
3.0.0.0.0 Authorization/Funding
4.0.0.0.0 Site Acquisition
5.0.0.0.0 Design/Build
6.0.0.0.0 Design
7.0.0.0.0 Construction
8.0.0.0.0 Tenant Occupancy

8.1.1.3.0.0 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

GSA - Public Buildings Service
Tenant Occupancy Page 4
8.0.0.0.0 Tenant Occupancy
Design/Build

8.1.1.4.0.0 Concept Design
8.1.1.4.1.0 Design Development
8.1.1.4.2.0 Mid-Point Construction Documents
8.1.1.4.3.0 100% Construction Documents

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

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

GSA - Public Buildings Service

Tenant Occupancy Page 5
8.1.1.2.2.0.b Occupancy Agreement (Accepted Draft):
Before Construction Award

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

Are budgets sufficient to cover construction proposal costs?

Has the TI estimate changed?

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

Revise OA using proposal costs

Transmit to agency for review

Award contract

Signed OA

Does agency agree?

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

No

Redesign or cancel project

No

Yes

Yes

Yes

No

No
8.0.0.0.0 Tenant Occupancy Design/Build

8.1.1.3.1.0 Occupancy Agreement (Accepted Draft): During Construction

Project Team conducts analysis to compare design estimates with any changes during construction.

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

Is additional funding required?

Yes: Proceed with construction.

No: 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

Design Development (Overview)
Construction Documents

Construction Administration

This page applies to: [D/B, D/B-Bridging, CMc]
8.0.0.0.0 Tenant Occupancy
Design/Build

8.1.1.5.0.1 Final Occupancy Agreement

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

Review draft OA and construction costs
Apply all appropriate costs to space by ABC
Calculate RENT by ABC
Develop final OA
Transmit to agency for review
Does agency agree?

Are there any changes from last signed OA?

Charge RENT and mediate with agency on outstanding costs

No

SOL

Yes

Signed OA

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

Initial RENT Start 8.1.3.0.0.0

This page applies to:

Traditional
D/B
D/B-Bridging
CMc

GSA - Public Buildings Service

Final OA (Reconciliation) 8.1.1.5.0.0

Tenant Occupancy Page 8
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?

No

Are there any changes from Final OA?

Action Required

Yes

Signed OA

Finalize OA in STAR

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

Design Development (Overview) 6.8.0.0.0.0

Construction Documents 6.9.0.0.0.0

OAs and RENT (Overview) 8.1.0.0.0.0

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc
8.0.0.0.0 Tenant Occupancy

Design/Build

8.1.2.0.0.0 National CAD/CIFM Standards

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**Project Team identifies funding source(s)**

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

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**CO awards contract option or task order for delivery of drawings**

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

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**Project Team reviews drawings and provides comments to contractor**

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**Contractor incorporates comments and submits final CAD drawings to Project Team**

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

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**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**

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**LINKS**

- BOMA Space Measurement Standards
- National CAD/CIFM Standards
- PBS-P100
- OAs and RENT (Overview) 8.1.0.0.0

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**This page applies to:**

- Traditional
- D/B
- D/B-Bridging
- CMa
1.0.0.0.0 Project Management Documents
2.0.0.0.0 Planning
3.0.0.0.0 Authorization/Funding
4.0.0.0.0 Site Acquisition
5.0.0.0.0 Design/Build
6.0.0.0.0 Design
7.0.0.0.0 Construction
8.0.0.0.0 Tenant Occupancy
8.1.3.0.0.0 Initial RENT Start

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**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**

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**LINKS**

- PBS Pricing Desk Guide
- Pricing Implementation for Project Management

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**This page applies to:**

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

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**GSA - Public Buildings Service**

8.1.3.0.0.0
8.0.0.0.0 Tenant Occupancy
Design/Build

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

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

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
- Tenant Move-In 8.2.6.0.0.0
- Initial RENT start 8.1.3.0.0.0

Judicial Security Prisoner Security

This page applies to:
✓ Traditional  ✓ D/B  ✓ D/B-Bridging  ✓ CMc
PBS is required to pay for vertical voice and data risers. Tenant is responsible for horizontal wiring and connections. FTS provides service only.

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

Determine age of telecommunications system and need for repair/replacement

Yes

Telecommunications Contracts

No

Agency procures, installs, and inspects telecommunications system installation

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

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

Does tenant need new telecommunications system?

LINKS

- PDS 2.5.0.0.0
- Fixtures, and Equipment (FFE)/Move-In (Overview) 8.2.0.0.0
- Agency IT Data Systems 8.2.3.0.0

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc
8.0.0.0.0 Tenant Occupancy

8.2.0.0.0.0 Telecommunications Installation - New Construction

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

8.2.0.0.0.0.0 Telecommunications Installation - New Construction

CD Submission (60-76%)
Tenant Telecommunications Requirements
Additional Phases Delivery (T1, Phases, Annexes) 7.1.13.0.0.0

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

Agency coordinates telecommunications system design A/E
Agency procures, installs, and inspects telecommunications system installation

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

In-house

Agency coordinates layout with design A/E

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

Develop Telecommunications Contract

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

Provide A/E estimate for inventory and telecommunications system design

Obtain RWA from agency for telecommunications system inventory and design

FTS procures, installs, and inspects telecommunications system installation

Telecommunications Installation - New Construction

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
8.0.0.0.0 Tenant Occupancy

8.2.3.0.0.0 Agency IT/Data Systems

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

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

8.2.3.0.0.0 Agency IT/Data Systems

Telecommunications Installation – R&A 8.2.2.0.0.0.a
DD Submission (35%) 6.8.5.0.0.0
CD Submission (60-76%) 7.1.3.0.0.0
Additional Phases Delivery

Tenant provides requirements for cabling and infrastructure

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

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

Integrate into CPM schedule

Fixtures, and Equipment (FFE)/ Move-In (Overview) 8.2.0.0.0.0
Tenant Occupancy
8.0.0.0.0

8.0.0.0.0 Tenant Occupancy
Design/Build

8.2.4.0.0.0 Security Systems Installation

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

8.2.4.0.0.0 Security Systems Installation

Project Team commences major security discussion in preparation for PDS

PDS Design Programming 2.5.0.0.0

Does tenant need new security system?

No

Only general building security is provided for tenant and documented in OA

Yes

Agency coordinates security system design with A/E

Agency procures, installs, and inspects security system installation

Will agency use in-house sources or DHS FPS?

A/E provides security system design

In-house

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

Will tenant use in-house sources or A/E for security system design?

A/E

Provide A/E estimate for security system design

Obtain RWA from agency for security system design

DHS FPS reviews and GSA procures, installs, and inspects security system installation

In-house

DD Submission (35%) 6.8.5.0.0.0

Security Design Requirements

CD Submission (60-75%)

Additional Phases Delivery 7.1.13.0.0.0

DHS FPS tests, inspects, and accepts security system

Security Systems Installation

LINKS

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

This page applies to:

☑ Traditional ☑ D/B ☑ D/B-Bridging ☑ CMc
8.0.0.0.0 Tenant Occupancy

Design/Build

8.2.5.0.0.0 USMS A/V and Security Systems Installation

Project Team commences major security discussions with USMS during DDs

A/E provides design IAW Pub 64

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

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

USMS inspects and reviews

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

Establish acceptance procedure and documentation with USMS

Pub 64, Section 3, current benchmark includes allowances for procurement and installation of Marshal Security Systems

LINKS

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

This page applies to:

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

GSA - Public Buildings Service 8.2.5.0.0.0 Tenant Occupancy Page 18
**Project Team coordinates, negotiates, and mediates move in**

**Systems**
- **Furniture** 8.2.1.0.0.0

**Agency IT/ Data Systems**
- 8.2.3.0.0.0

**Security Systems**
- **Installation** 8.2.4.0.0.0

**USMS A/V and Security Systems**
- **Installation** 8.2.5.0.0.0

**Telecommunications Installation** – R&A
- 8.2.2.0.0.0.a

**Who will perform the move?**

- **Tenant**
  - Coordinates move schedule with GSA property manager

**Establish scope**
- Survey existing space
- Establish move-in schedule
- Establish responsibilities
  - Responsibilities, costs, funding, and schedules established

**Tenants move in**
- GSA provides boxes, labels, and instructions for destination

**Who will pack?**
- Tenant
- Survey furniture and equipment
- Determine when building is ready (all at once or phased)
- Determine when agencies are available to move and if they desire a phased move within the agency

**Obtain quotes from move vendors**

---

**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

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