This page applies to:

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

- Traditional
- D/B
- D/B-Bridging
- CMc
Pre-Project Planning (Overview)

Is it a capital project?

Yes

Commence FS 2.4.1.0.0.a

Select the best alternative

Select project delivery method and prepare PMP and AQP 1.1.1.0.0.b

To be developed in Phase II

Overview of Capital Investment and Leasing Program (CILP) process

This page applies to:

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

Project Coordination exists at every level

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

2.1.0.0.0.1 Pre-Project (Preliminary) Planning

Identify need/driver

Define Facility Master Plan 2.1.1.0.0.0

Define BER Requirements 2.1.3.0.0.0

Obtain agency requirements

Meet request in BA54 Program Small Projects Process

Can request be met in existing space?

Yes

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

No

Is it below prospectus?

Yes

Submit construction prospectus

Prepare PDS 2.5.0.0.0.0

No

Conduct programming and review benchmarks (OCA-GCCRG)

Review programming and cost estimates

Is it new construction?

Yes

Prepare Initial Draft OAs 8.1.0.0.0.0

No, R&A

Prepare Draft PMP 1.1.1.0.0.0.b

Initiate FS 2.4.1.0.0.0.a

Submit Site and Design Prospectus

Conduct programming and review benchmarks (OCA-GCCRG)

Yes

Submit site/design funding?

No

Receive authority to start A/E and site procurements

See A/E Selection Process and CMa

Verify site/design funding?

Yes

This page applies to:

☑ Traditional ☑ D/B ☑ D/B-Bridging ☑ CMc
Pre-Project (Preliminary) Planning

1.0.0.0.0.0 Project Management Documents

1.1.0.0.0.0.a Project Coordination

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

1.1.0.0.0.0.a Assemble Project Team
1.1.1.0.0.0.a Design Start-up Workshop
1.1.5.0.0.0 Project Website(s)

This page applies to:

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

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

Project Coordination exists at every level.
1.0.0.0.0  Project Management Documents

Design/Build-Bridging

1.1.0.0.0.a PMP: Assemble 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.
Existing condition assessments are required to develop scope and costs for R&A alternatives.

Project Team reviews existing information

Is additional information needed?

Yes

Incorporate assessments into FS or PDS if D/B

No

Obtain additional information

Use Project Consultant Task Order

Include in FS

Include in PDS if D/B

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

Will the agency request be satisfied within existing inventory?

- Yes
  - Will it be a capital project?
    - Yes
      - Project Team will study viable alternatives in FS 2.4.1.0.0.a
      - PDS if D/B 2.5.0.0.0
    - No
      - ABT will prioritize in small projects process (BA54)
  - No
    - Project Team reviews appropriate LPP

Is it a capital project?

- Yes
  - Project Team will study viable alternatives in FS 2.4.1.0.0.a
  - PDS if D/B 2.5.0.0.0
- No
  - ABT will prioritize in small projects process (BA54)
2.0.0.0.0 Planning
Design/Build-Bridging

2.1.1.0.0.0 Campus/Facility Master Plans

Project Team confirms clients’ short-term and long-term needs. Would an updated Master Plan benefit the project?

Yes

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

No

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

Respond to individual requests independently

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.

1. Project Team reviews existing BER

2. Is it necessary to proceed to next level?

3. Project Team reviews open work item inventory in IRIS

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

Yes:

1. Complete Level 4 BER to support capital project submission

2. Use Project Consultant Task Order 6.1.0.0.0.0.a

3. Include in FS Scope 2.4.1.0.0.0.a

4. Include in PDS if D/B 2.5.0.0.0.0

No:

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

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc
Accessibility surveys are used primarily in R&A projects to gain an understanding of accessibility deficiencies and associated costs, to be included in the R&A alternative.

**Is additional information needed?**

- **Yes:** Obtain additional studies
- **No:** Incorporate accessibility work items into project scope

**Project Team consults with Regional Accessibility Officer to determine existing information**
2.0.0.0.0 Planning  
Design/Build-Bridging  
2.1.3.1.0.0 Fire/Life Safety Study

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

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.

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

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

Is additional information needed?

Yes → Obtain additional information

No → Incorporate Hazardous Materials Survey information into building O&M plan and/or work items for project scope

Use Project Consultant Task Order 6.1.0.0.0.0.a

Include in FS Scope 2.4.1.0.0.0.a

Include in PDS if D/B 2.5.0.0.0.0
2.0.0.0.0 Planning
Design/Build-Bridging

2.1.6.0.0 Highest and Best Use Appraisal (R&A)

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

Project Team reviews current ABP

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

Yes

Obtain updated appraisal

Regional term contract

Use Project Consultant Task Order 6.1.0.0.0.0.a

Include in FS Scope 2.4.1.0.0.0.a

Include in PDS if D/B 2.5.0.0.0.0

No

Appraisal data included in FS for R&A alternative cost evaluation or PDS if D/B
Consult with FPS/DHS and Building Security Committee to determine applicability of a security charrette

2.0.0.0.0 Planning
Design/Build-Bridging

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
Planning
Design/Build-Bridging

2.1.9.0.0.0 Energy Conservation Audit

Project Team consults with Regional Energy Coordinator to determine existing information.

Is there an existing building energy audit?

Is this an existing building?

No
Yes

Develop energy usage targets for new construction with central office.

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

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

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

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc
2.4.1.0.0.0.a Feasibility

**Feasibility: R&A**

- Asset Manager performs inventory analysis and financial analysis
  - Asset Manager performs inventory analysis and financial analysis
  - Identify agency-specific allowances (e.g., USMS)
  - Develop cost estimates by Shell and TI
  - Identify preferred alternative
  - Conduct risk assessment for project alternatives
  - Define building security amortized capital costs

**Feasibility: New**

- Asset Manager performs inventory analysis and financial analysis
  - Asset Manager performs inventory analysis and financial analysis
  - Identify agency-specific allowances (e.g., USMS)
  - Develop cost estimates by Shell and TI
  - Identify preferred alternative
  - Conduct risk assessment for project alternatives
  - Define building security amortized capital costs

**Feasibility: Lease**

- Asset Manager performs inventory analysis and financial analysis
  - Asset Manager performs inventory analysis and financial analysis
  - Identify agency-specific allowances (e.g., USMS)
  - Develop cost estimates by Shell and TI
  - Identify preferred alternative
  - Conduct risk assessment for project alternatives
  - Define building security amortized capital costs

Additional technical studies required?

Yes

- Obtain necessary studies by contract

No

- Compile available technical studies
- Award appropriate work to contractors
- Asset Manager provides client housing information
- Project Team prepares SOW for FS
- Include PDS scope if D/B
- Complete PDS if D/B

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

2.4.1.0.0.0.b Feasibility (Continued)

Complete FS

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

Submit site and design prospectus

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

- Utilize cost estimating tool for design and M&I budgets

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

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

6.3.0.0.0 CMa/Commissioning Authority (Cx) Services

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

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

Programmatic discussion may be found in The Building Cx Guide

Planning
- Project Team will need Cx assistance during preparation of the FS

Develop preliminary Cx Plan and required budget in FS

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

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

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

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

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

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

Special Project Consultants may be needed throughout the project process.

- Project Team determines the need for consultants based on the specific needs of the project.
- Project Team develops SOW.
- Project Team determines the best method for obtaining consultant(s) and updates AQP.
- Project Team obtains IGE.
- CO issues RFP.
- CO receives proposals.
- CO evaluates proposals and prepares PNP.
- CO completes contract evaluations and advises Project Team of pending award.
- CO awards Project Consultant Contract.

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

IDIQ, FSS or stand-alone contract.
Review accessibility
Review fire safety
Review hazardous materials
Review reinvestment index
Review building systems needs

Project Team conducts study based on construction type

Concurrent evaluations

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

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

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 2.1.2.0.2.0
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
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-Bridging

2.4.1.0.0.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 the PM Guide

LINKS

GSA Guidebook I – Acquisition of Real Property

GSA Guidebook II – Relocation of Residents and Businesses

PBS-P100

PMP 1.1.1.0.0.0.b

Pre-Project (Preliminary) Planning 2.1.0.0.0.1

NHPA 2.2.0.0.0.0

NEPA 2.3.0.0.0.0

This page applies to:

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

4.0.0.0.0.b Site Investigation Tasks for FS

---

**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

---

*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.

---

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

---

**LINKS**

- Fact Sheet on Executive Order 13006

---

**This page applies to:**

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

---

GSA - Public Buildings Service
NHPA
RHPO coordinates with SHPO. RHPO briefs Project Team on progress of consultation(s)
2.2.0.0.0

Special Studies Due Diligence
Regional NEPA Program Coordinator manages NEPA studies, public meetings, and mitigation measures. Coordinator provides regular updates to Project Team
2.3.0.0.0.0

NEPA
Regional NEPA Program Coordinator manages NEPA studies, public meetings, and mitigation measures. Coordinator provides regular updates to Project Team
2.3.0.0.0.0

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
4.0.0.0.0.0.a

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

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

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

Concurrent Activities
Concurrent Activities

NEPA
Regional NEPA Program Coordinator manages NEPA studies, public meetings, and mitigation measures. Coordinator provides regular updates to Project Team
2.3.0.0.0.0

Special Studies Due Diligence
Regional NEPA Program Coordinator manages NEPA studies, public meetings, and mitigation measures. Coordinator provides regular updates to Project Team
2.3.0.0.0.0

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
4.0.0.0.0.0.a

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

CONCURRENT ACTIVITIES

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

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

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

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

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

Project Team assigns team roles and responsibilities

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

Allow 6-12 months in project schedule

Allow 6-15 months in project schedule

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

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

This page applies to:

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

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

**RHPO updates Project Team as needed.**

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

LINKS

- Fact Sheet on Executive Order 13006
- GSA Guidebook I – Acquisition of Real Property
- GSA Guidebook II – Relocation of Residents and Businesses
- NEPA
- NHPA
- PMP: Assemble Project Team 1.1.1.0.0.0.a
- PMP 1.1.1.0.0.0.b
- Planning 2.0.0.0.0
- Relocation Planning 2.6.0.0.0.0
2.0.0.0.0 Planning Design/Build-Bridging

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

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

GSA Guidebook I – Acquisition of Real Property

GSA Guidebook II – Relocation of Residents and Businesses

NEPA

NHPA

PMP: Assemble Project Team 1.1.1.0.0.0.a

PMP 1.1.1.0.0.0.b

Planning 2.0.0.0.0

Relocation Planning 2.6.0.0.0.0

This page applies to:

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

2.6.0.0.0 Relocation Planning

- Review housing plan and tenant needs/requirements
- Identify the phasing plan assessing unique tenant requirements
- Review cost and schedule impacts of required phasing/swing space
- Prepare required lease AQP
- Incorporate phasing/swing costs into FS and project budget

- Is there site-related relocation or swing space?
  - Identify potential project sites and impacts from resident/business displacement
  - Review cost and schedule impacts for viable alternative sites
  - Incorporate relocation issues into site cost estimate for FS

- Complete FS and prepare Site and Design Prospectus
- Or
- Compile site data and prepare Site Prospectus if D/B

Coordinate with RHPO and NEPA Coordinator as issues are identified

- Update FS estimates during PDS for Construction Prospectus submission

**LINKS**

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

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc
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
- Develop preliminary Cx Plan and required budget in FS
- Cx integrated into FS and updated in PDS

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

Construction
- CMa or CxA executes Cx Plan as to performance, checklists, testing and progress reports
- Systems performance documented and accepted
- System performance sustained

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

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

1.1.1.0.0.b Project Management Plan (PMP)

**Design/Build-Bridging**

1.1.1.0.0.b Project Management Plan (PMP)

**PM coordinates PMP development with Project Team**

**Incorporate HCAM/TMP**

**Draft PMP submitted with Site and Design Prospectus**

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

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

**PMP establishes resources, schedule, and budget**

**PM leads review and update of PMP, including approvals**

**Confirm customer expectations, including OA reviews/updates**

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

**LINKS**

- 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
Project Team evaluates project needs and discusses project delivery methods.

Project Team selects delivery method.

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.

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
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</th>
<th>General Contractor (GC) or Construction Contractor (CC)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Traditional</td>
<td>GC should be on board during Concept development by A/E for maximum benefit to GSA</td>
</tr>
<tr>
<td>CMc</td>
<td>GC will be on board during Concept development by A/E for maximum benefit to GSA</td>
</tr>
<tr>
<td>D/B</td>
<td>D/B hires A/E</td>
</tr>
<tr>
<td>D/B-Bridging</td>
<td>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</td>
</tr>
</tbody>
</table>

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

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

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

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

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

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

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>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>
</tbody>
</table>

- Project Team determines SOW required from the CMa and the level of services required in each Phase: Design Concepts, DDs, CDs, Construction Administration, through Start-up and Turnover.
- Project Team determines the level of Cx desired (considering timing of project and budget constraints). A complete Cx Plan is required for FY 2007 Design Starts.
- The process is outlined in the Guide for AiA OCA Program managers are available on this sensitive program.
- Procurement procedures apply. Specialty Consultants may be a separate contract or a part of other services provided by CMa, CMc, GC/CC.

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

Design/Build-Bridging

1.1.3.1.0.0 Initiate Project in PIP

Create project in database

Utilize PMP template

Take information from FS and enter as new project in PIP to coincide with CILP

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

Refer to annual CILP instructions
1.0.0.0.0 Project Management Documents
Design/Build-Bridging

1.1.3.2.0.0 Project Updates in PIP

1.1.3.2.0.0.0 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

This page applies to:

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

1.1.5.0.0 Project Website(s)

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

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

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

This is for sensitive but not classified documents

**LINKS**

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

**This page applies to:**

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

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

Present PMP to OCA representatives and GSA peers (PMs)

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

PMs update PMP as needed

PM assembles Project Team (Transition is made from ABT)

LINKS

This page applies to:

Traditional, D/B, D/B-Bridging, CMc
2.5.0.0.0 Program Development Study (PDS)

Project Team formalizes strategy to complete PDS

Assess supporting documents

Implement PDS procurement strategy

Regional ABT prepares draft construction prospectus

Complete PDS

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

If New Construction: Review and update benchmarks.

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

- Develop PDS SOW
- Select and award PDS contract
- Continue stakeholder discussions
- Update program goals
- Conduct design programming
- Update design directives

Does timing allow use of DE A/E?

No

Use Project Consultant Task Order 6.1.0.0.0.a

Yes

PROJECT DOCUMENTS

1.0.0.0.0 Project Management Documents
2.5.0.0.0 Program Development Study (PDS)
2.0.0.0.0 Planning
3.0.0.0.0 Authorization/Funding
4.0.0.0.0 Site Acquisition
5.0.0.0.0 Design/Build
6.0.0.0.0 Design
7.0.0.0.0 Construction
8.0.0.0.0 Tenant Occupancy

LINKS

- Project Planning Guide (PPG)
- Project Coordination 1.1.0.0.0.a
- Pre-Project (Preliminary) Planning 2.1.0.0.1
- Feasibility 2.4.1.0.0.a

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc
Regions submit draft construction prospectus based on CILP requirements

Central Office reviews and prioritizes submissions

Central Office submits prospectus to OMB

Region obtains funding and awards construction contract

Region submits allowance request to Central Office

Central Office obtains funding

OCA hosts construction start workshop

Congress approves construction budget

This includes House and Senate authorization and appropriation

OMB includes construction prospectus in President’s budget

Project to be resubmitted in future FY

Not approved

OMB passback

Approved
Design/Build-Bridging

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

- Site Investigation Tasks for FS 4.0.0.0.0.0.b
- Site Acquisition 4.0.0.0.0.0.a
- A/E Procurement (Overview) 6.2.0.0.0.0
- CMa/Commissioning Authority (Cx) Services 6.3.0.0.0.0
- CMa SOW 6.3.1.0.0.0.a
- CxA SOW (if apart from CMa) 6.3.1.0.0.0.b
- AiA Contract 6.1.0.0.0.0.b
- Project Consultant Task Order 6.1.0.0.0.0.a
- Concept Design (Overview) 6.7.0.0.0.0
- Design Development (Overview) 6.8.0.0.0.0
- Construction Documents 6.9.0.0.0.0

GC Procurement commences when contract drawings are complete.
Project Team receives site directive from OCA

Project Team confirms roles and responsibilities

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

Concurrent

Concurrent

NHPA 2.2.0.0.0.0

Site Investigation 4.0.0.0.0.b

NEPA 2.3.0.0.0.0

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

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

Chair updates Project Team on status of site selection process

Site Team orders technical studies and updates the Project Team accordingly

Use Project Consultant Task Order 6.1.0.0.0.0.a

Design documents reflect mitigating measures for NHPA or NEPA as appropriate

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

Site Selection includes complex compliance issues to include but not be limited to EOs, NEPA, NHPA, Due Diligence, NAGPRA, CERCLA, et al. Special technical studies are typically required for site evaluation/cost impacts. Project Team must rely upon regional/national specialists to address this complex process.
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
  - No
    - ESA completed

Complete survey
- ROD
  - Develop costs to clean property
  - Incorporate mitigation into design documents
  - Acquire site
- FONSI
  - Review and approve final appraisal
  - Deduct cost to clean property
  - Determine final property valuation

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-Bridging

6.2.0.0.0 A/E Procurement (Overview)

OCA issues Site and Design Directive

Develop A/E SOW 6.2.1.0.0.0.a

Prepare Source Selection Plan 6.4.2.0.0.0

Issue RFQ

Complete Contract Evaluation

Use Project Consultant Task Order 6.1.0.0.0.0.a

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/E Procurement (Overview)
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy

This page applies to:

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

A/E Services SOW (Overview) 6.2.1.0.0.0.a
6.0.0.0.0 Design

Design/Build-Bridging

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

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

LINKS

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

This page applies to:

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

6.4.2.0.0 Source Selection Plan

OCA issues Site/Design Directives

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

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

Two-Stage Selection

Project Team commences DE procedures for A/E selection process

SSA appoints A/E Evaluation Board with OCA approval

A/E Evaluation Board develops Selection Criteria and Evaluation Methodology

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

SSA approves the SSP

Two-Stage Selection plus Design Charrette

Three-Stage with Design Competition

The Evaluation Board shall be composed five voting members:

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

Two advisors

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

Coordinate with CO, OCA and Legal

LINKS

<table>
<thead>
<tr>
<th>Acquisition Plan</th>
<th>DEP&amp;P</th>
<th>FAR</th>
</tr>
</thead>
<tbody>
<tr>
<td>GSAM</td>
<td>PIP template for PMP</td>
<td>PMP Examples</td>
</tr>
</tbody>
</table>

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc
One member is appointed to serve as Chair. If utilizing the Design Charrette, a Professional Advisor is hired to organize the charrette.

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

Conduct Phase II interviews and Design Charrette as detailed in PMP 1.1.1.0.0.0.b

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

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

**Phase I**
- 35% - Design Firm - past performance
- 25% - Lead Designer’s philosophy and design layout
- 25% - Lead Designer’s portfolio
- 15% - Lead Designer’s profile

**Phase II**
- 50% - Team design performance
- 30% - Team organization and management
- 15% - Professional qualifications
- 5% - Geographic location

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

Issue Task Order for Professional Advisor to manage the Design Charrette

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc
Project Team conducts a Design Competition IAW DEP&P

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

Coordinate Planning with OCA and Competition Advisor and Hold Vision Competition

Blind Evaluation of Vision Competition by Independent Jury of National Peers

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

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

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

Final Selection by the GSA Regional Selection Authority
6.2.2.0.0.0, 6.2.4.0.0.0, and 6.2.5.0.0.0 A/E Source Selection/Evaluation Process

A/E Source Selection/ Evaluation Process

- Project Team receives approved SSP and commences A/E selection
- Prepare and clear CBD and design magazine announcements with approval by region/OCA
- Conduct pre-proposal conference to discuss the scope of services required by GSA, the A/E selection process, and the project delivery process
- A/E Board receives portfolio submissions by design firms and lead designers
- A/E Evaluation Board evaluates and selects a “short list”
- Short-listed firms assemble complete A/E design teams and submit SF 254/255
- A/E Selection Board evaluates SF 254/255 submittals and interviews design teams
- A/E Evaluation Board ranks A/E teams based on evaluation criteria
- Schedule Interviews with short-listed A/Es
- Receive Phase II submissions

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

Yes
- A/E Board makes final ranking and recommendations to the GSA selection authority
- GSA selection authority makes final selection
- Negotiations begin with the selected firm for the A/E contract

No
- Project Team conducts a Design Charrette
- Design Competition

Advertise for Design Architect – Bridging Design Services

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

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

GSA - Public Buildings Service

Design Page 9
GSA issues initial SOW to A/E

Meet with A/E to review SOW

Revise SOW

Update government fee estimate

Request proposal

Receive and review proposal

Prepare technical evaluation including PNP

PM/CO conduct negotiation with A/E

Prepare PNM

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

Award A/E contract and compile contract file

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

Confirm project goals and objectives

Review prospectus, FS, BER, etc.

Confirm construction budgets

Building Cx Guide

CMa must be on contract concurrent with Design A/E to maximize their input early in the Design Concepts and DDs. This would apply to CMc.
Project Team confirms project goals and objectives with all stakeholders.

Project Team reviews PMP strategy and required Cx services 1.1.0.0.0.b

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

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 Scope of Work 6.3.1.0.0.0.a

GSA - Public Buildings Service 6.3.1.0.0.0.b Design Page 12

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

LINKS
- Building Cx Guide
- DEP&P
- HVAC Excellence
- LEED
- PBS-P100
- Pricing Implementation for Project Management
- SOW Examples
6.0.0.0.0 Design
Design/Build-Bridging

6.3.2.0.0 CMa Task Order/CxA Task Order

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

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

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

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

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

LINKS

FS PDS PMP Reference

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

GSA - Public Buildings Service

6.3.2.0.0.0
Design Page 13
6.0.0.0.0.0 Design
Design/Build-Bridging
6.1.0.0.0.0.b Art-in-Architecture Contract

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

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

Project Team has awarded A/E contract. SOW includes Lead Designer’s participation on AIA panel. RFAO will coordinate the panel.

Establish introductory meeting

Conduct introductory meeting to review project objectives and artist selection process

Solicit for artists (request for interest)

Schedule and coordinate Artist Review/Panel Meeting(s)

Panel receives and reviews artist slides and resumes

Panel prepares short list of artists for OCA

OCA representative and RFAO evaluate artists and prepare recommendation

Review recommendation/artist with RA

Revise and issue final contract

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

Issue draft contract

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

Commissioner approves artist selection

Forward recommendation letter to OCA and Program Manager

Write recommendation letter for RA signature

Acceptable?

Yes

No

LINKS

Fine Arts Desk Guide

This page applies to:

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

6.7.0.0.0 Concept Design (Overview)

- Concept Design Partnering Workshop
- Design Charrette Documents
- Concept Design Submission
- Design Excellence Peer Review
- Concept Design Review Comments
  Design selection
  VE workshop
- Final Concept Review Comments
  (Government Delivery Team)
- AIA Concept Design
- Final Concept Presentation to Commissioner
- Independent OCA Estimate
- Concept Design Review Comments
  (Urban Design Review Boards)
- Some processes may be concurrent
6.0.0.0.0 Design

Design/Build-Bridging

6.7.0.0.1.a Concept Design

This page applies to:

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

**6.7.0.0.1.b Concept Design (Continued)**

A/E incorporates VE, develops final presentation

- **Validate funding sources**

Conduct regional presentation

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

Prepare final concept submission

- **The OCA review is concurrent with the final concept review**

Submit for OCA IGE

- **Verify budget compliance by performing IGE**

Review final concept submission

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

A/E incorporates review comments

- **Review comments are submitted from all interested stakeholders. A/E will either incorporate the review comments or indicate to the GSA PM another disposition along with their rationale.**

Conduct presentation to Commissioner

- **OA Update 8.1.1.3.0.0**

OCA prepares Commissioner’s final concept approval memorandum

- **Issue NTP for DD phase**

---

**Use Agency Design Guides**

**LINKS**

- Design Review Checklist
- DrCHECKS
- LEED 20 EB Requirements
- PBS-P100
- PBS Pricing Desk Guide
- PDRI

**This page applies to:**

- Traditional
- D/B
- D/B-Bridging
- CMc
Partnering workshop is an opportunity to introduce all stakeholders and the project team, establish a partnering statement and charter. Each party has an opportunity to state their goals for the project.

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

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

Establish lines of communication and roles and responsibilities.

Compare notes with other PMs and management on their partnering experience and expectations.

Partnering workshop is an opportunity to introduce all stakeholders and the project team, establish a partnering statement and charter. Each party has an opportunity to state their goals for the project.

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

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

Establish lines of communication and roles and responsibilities.

Compare notes with other PMs and management on their partnering experience and expectations.

Partnering workshop is an opportunity to introduce all stakeholders and the project team, establish a partnering statement and charter. Each party has an opportunity to state their goals for the project.
Design Charrette Documents

1.1.1.0.0.0
1.1.1.0.0.c

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

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

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

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

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

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

GSA - Public Buildings Service

6.7.4.0.0.0

Design Excellence Peer Review 6.7.7.0.0.0
At least three distinctly different concepts will be submitted by the A/E team.

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

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

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

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

OCA will recommend the final concept.

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

Potential for multiple peer reviews.

Initiate contact with OCA to set up second peer review approximately 6 to 8 weeks in advance of presentation.
6.7.6.3.0.0 Concept Design Review Comments Including Concept Design Selection and 6.7.9.0.0.0 VE Workshop

A/E prepares/distributes interim submission

Project Team 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

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

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

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

Project Team may include GC if they are on board

On-board reviews are usually informal and discretionary. They are conducted to check the progress status of various disciplines. Attendees will vary depending upon issues to be reviewed. Separate breakout sessions by discipline, e.g., fire protection, mechanical, electrical, architectural, may be effective.
Community outreach is an ongoing process. The design A/E firm may take the lead on some of these efforts, while the PM may be instrumental in arranging meetings with these groups and other GSA consultants.

Coordinate timing to regional policies

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

Preferred: include the presentation of the AIA

OCA issues Task Order for IGE

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

OCA will review and comment within 10 working days

Reconciliation of IGE and A/E estimate

Is project within budget?

Yes -> Schedule presentation to Commissioner

Coordinate meeting logistics

A/E and PM conduct presentation

OCA prepares Commissioner final concept approval memorandum

Issue NTP for DD phase

No -> Concept Design (Overview) 6.7.0.0.0

Redesign to budget

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.
Artist initial meeting

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

Artist prepares concept design(s)

Conduct internal GSA review, as necessary

Peer review may occur in this step

Present final concept to art panel

Art panel approves concept?

Yes

RA recommends approval of concept to OCA and Commissioner

Art concept may be incorporated into the A/E’s final concept design presentation to Commissioner

No
6.8.0.0.0.1 Design Development (Process)

Conduct interim submission(s) review

Is another interim submission required?

Yes

Conduct interim submission(s) review

Conduct DD Program Review Workshop (optional) 6.8.1.0.0.0

Review Tenant Telecommunication Requirements

Update PDRI

Verify budget compliance by performing IGE

Conduct National CAD/CIFM Standards Completeness Review

Prepare/ Distribute Interim DD Submission(s) 6.8.5.0.0.0

Interdisciplinary Coordination Review

Prepare Construction Strategy Phase Plan DD 6.8.9.0.0.0

Conduct OCA Review 6.8.11.0.0.0

Owner’s/Code/Constructability Staff Reviews

If another interim submission required?

No

Prepare final DD submission

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

Conduct DD VE Workshop

Evaluate and Incorporate VE Recommendations

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

Update IGE

Confirm Tenant Telecommunication Requirements

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

OA Update 8.1.1.3.0.0

NTP to CD phase

This page applies to:

Traditional D/B D/B-Bridging CMc

6.8.0.0.0.2 Utility Rebate Program Review

National CAD/CIFM Standards OA Tool

PBS-P100 PDRI

Concept Design (Overview) 6.7.0.0.0.0

GSA - Public Buildings Service 6.8.0.0.0.1 Design Page 26
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.

**LINKS**

- HVAC Excellence
- PBS-P100

**This page applies to:**

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

Design Page 27
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.

Is a workshop needed?

Yes

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

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

No

Verify scope and budget are within the approved prospectus

Utilize the PDRI for a programmatic review. Results of the PDRI may substitute for the workshop or highlight areas in need of further development and definition.
6.0.0.0.0 Design
Design/Build-Bridging

6.8.2.0.0 DD Systems Selection Analyses

A/E defines and sizes base systems and alternatives

Must be aligned with LEED goals

A/E performs life cycle cost analysis

Structural, mechanical, electrical, plumbing, etc.

DD Submission for Project Team review

Project Team makes system selections

OCA HVAC peer review

This page applies to:

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

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

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

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

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

This page applies to:
☑ Traditional ☑ D/B ☑ D/B-Bridging ☑ CMc
Project Team will ensure the A/E SOW reflects this submission and the appropriate reference to PBS-P100 Appendix A, Submission Requirements.

OCA will review and comment within 10 working days.

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

Final approvals will be issued by the PM/CO.

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

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

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

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

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

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

GSA - Public Buildings Service

7.0.0.0.0 Construction Design/Build-Bridging

6.10.0.0.0 Construction Procurement

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

Construction Page 2
6.10.1.0.0.0 GC/CC Source Selection Plan

1. Project Team reviews AQP and PMP
2. Establish SSEB
3. Develop SSP Criteria
4. SSEB reviews and SSA approves SSP
5. GC/CC Evaluation Factors (Phase I) 6.10.1.1.0.0
6. GC/CC Evaluation Factors (Phase II) 6.10.13.0.0.0
7. Draft SSP
8. Review with legal counsel if necessary
9. SSEB reviews and SSA approves SSP
10. Revise and resubmit
11. Is it approved?
12. GC/CC – GC – refers to GC under the Traditional Delivery Methods and CC – refers to Construction Contractor under all other delivery methods.

Links:
- FAR
- GSAM
- Sample SSP
- Source Selection Guide
- Pre-Proposal Conference 6.10.4.0.0.0

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

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

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

---

6.10.4.0.0.0

Project Team reviews
Acquisitions Plan, SSP
and PMP

CO develops and issues
FED BIZ OPS advertisement

Market project to prospective contractors

Coordinate solicitation/
RFP distribution following
GSA document security policy

Announce
date, place, and time
for Pre-Proposal Conference
6.10.4.0.0
Project Team determines: date, place and time for Pre-Proposal Conference

- CO sets up SBA networking processes
- CMa sets up site tour(s) (if applicable)
- PM/CO develops agenda
- PM/CO conducts meeting and tour
- CMa provides minutes/sign-in sheet to all attendees

Is another Pre-Proposal Conference necessary?

- Yes: Proceed with Proposal Document Addenda 6.10.11.0.0.0
- No: Proceed with Proposal Document Addenda 6.10.11.0.0.0

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

**6.10.11.0.0 Proposal Document Addenda**

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

**LINKS**

- FAR
- GSAM

**This page applies to:**

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

GSA - Public Buildings Service 6.10.0.0.0 Construction Page 6
GC/CC Selection Evaluation Factors (Phase I)

6.10.1.1.0.0 GC/CC Selection Evaluation Factors (Phase I)

6.10.8.0.0.0 GC/CC Evaluations/Selection (Phase I)

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
6.10.1.0.0.0 GC/CC Selection Evaluation Factors (Phase I)
6.10.8.0.0.0 GC/CC Evaluations/Selection (Phase I)
8.0.0.0.0.0 Tenant Occupancy

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

SSEB independently evaluates Phase II proposals

Develop a competitive range

Interview those in the competitive range

SSEB determines final consensus scores and ranking

SSEB Chairman drafts final report and issues to SSA for approval

Are price proposals within available funds?

Update OA prior to award

Notify offerors

Develop negotiation strategy

Implement strategy

Offerors within the competitive range submit BAFO

No

Yes
If GC/CC is providing Design and Constructability Reviews, the NTP will be issued to GC/CC for Design and Constructability Reviews. The GMP option for construction (NTP) will be exercised at a later date, as determined by Project Team and detailed in PMP and AQP.
Some processes may be concurrent
7.0.0.0.0 Construction
Design/Build-Bridging

7.1.1.0.0.0 Notice To Proceed

- CO issues NTP
- Include partnering and construction kick-off information in NTP letter
- Project team reviews the benefits of holding partnering concurrently with kick-off or delaying until after kick-off 7.1.3.0.0.0.b
- Determine best option

Concurrent Meetings

- Conduct Construction Kick-off Meeting 7.1.2.0.0.0
- Conduct Partnering Session 7.1.3.0.0.0.a

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

6.9.0.0.0.0 Construction Documents

**Project Team issues Project Directives Report to A/E**

- CO issues NTP to A/E for construction documents
- A/E prepares and issues CD Submission (60-75%) (midpoint)
- Project Team reviews and issues comments to A/E
- Prepare and Issue CD Submission (Pre-final 90%)
- Review and issue comments
- A/E to validate and incorporate all review comments into 100% CDs
- Independent verification of review comments
- CMa/CMc Update Estimate 6.7.12.0.0.0
- Prepare PBS CAD Library Submission

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

CD submissions, including A/E cost estimates, must be furnished IAW PBS-P100, Appendix A

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

Verify Shell and T.I., Validate Funding Sources

Coordinate with AiA Fabrication and Installation 7.1.4.0.0.0

Finalize/issue construction bid documents

OA Update 8.1.1.3.0.0

**LINKS**

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

This page applies to:

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

GSA - Public Buildings Service 6.9.0.0.0.0 Construction Page 12
6.9.3.0.0.0 CD Program Review Workshop (CD Start)

Project Team determines the need for CD Program Review Workshop

Is the program within scope and budget?

Yes

Review and update Cx Plan as needed

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

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

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

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

Is the program within scope and budget?

Yes

Review PMP 1.1.0.0.0.b

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

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

Is the program within scope and budget?

No

Yes

CMa conducts review and IGE

Project Team reviews submission and prepares comments

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

Update OAs as needed 8.1.1.3.0.0

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

Similar to Concept Program Review

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

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

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

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

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

OCA completes IGE to insure project is within budget.

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

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

Update OAs as needed.

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

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

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

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

Update OAs as needed 8.1.1.3.0.0

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

CxA review as specified in Cx Plan

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

No

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

Construction Officer will proceed with Construction Procurement when funds are authorized

6.0.0.0.0.0 Design

Design/Build-Bridging

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

Determine professional services needed for construction administration

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

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

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc
7.1.2.0.0.0 Construction Kick-off Meeting

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

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

The Notice to Proceed is used to start the project.
Project Team discusses upcoming Partnering Session.

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

Project Team determines location, date, and time for Partnering Session and will require a partnering facilitator.

Selection process: consultant or in-house?

Issue a task order for Specialty Consultant 6.1.0.0.0.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

The Project Team evolves over the life of the project. As contractors (A/E, CMA, CMc, Cx, GC/CC) and special consultants are hired, they become a part of the Project Team.
Option A: Holding partnering concurrently with kick-off:

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

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

Option B: Delaying partnering until after kick-off:

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

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

A/E Meeting:
Discuss with the A/E team planning trigger for whether the team feels an outside consultant for the Partnering Meeting is necessary.
Consult with Office of Customer Service: Is groundbreaking needed?

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

- No
  - Construction Administration 7.1.6.0.0.0.a

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

Some processes may be concurrent.

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

GSA - Public Buildings Service 7.1.6.0.0.0.a
Construction Page 22
Project Team will assign roles and responsibilities for the project. Some of the following tasks may be performed by CMa/CxA as identified in respective SOW.

All of these processes are concurrent.

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc
Project Team reviews project-specific Safety Management Plan

Accept plan?

Yes

Project Team implements and monitors safety plan

Project Team receives reports

No

Provide feedback to contractor
Periodically monitor and update budget based on change orders and projections.

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
- Update OAs to reflect construction changes as necessary
- Update PIP to reflect construction changes as necessary
Project Team develops process to manage RFIs

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

CMa prepares log and tracks the RFI

Responsible party reviews and responds

Respond to contractor

Contractor reviews response

Does response merit change order?

Yes

GC/CC Contract Modifications 7.1.6.8.0.0

What are the budget and schedule implications of the contract modifications?

No

Does response merit change order?

No

GC/CC implements response

A/E, CMa, or ePM depending on the chosen process by Project Team

A/E, CMa, GSA, or customer depending on responsible party

RFI process will be adjusted to meet project needs and may be different for D/B

This page applies to:

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

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

- **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.**
      - **No**
        - **Cost loaded schedule must be approved as provided in CPM examples**
- **No**
  - **Provide feedback to GC/CC**
- **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**

**LINKS**

- CPM Examples
- Project Updates in PIP 1.1.3.2.0.0

**This page applies to:**

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

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GSA - Public Buildings Service 7.1.6.2.0.0 Construction Page 27
GC/CC contractor prepares and delivers submittal schedule

Is submittal schedule accepted?

Yes

Project Team establishes process to track submittals

Manage and update submittal log via monthly/weekly scheduled meetings

Typically managed by CMa

No

Provide feedback to contractor

Review submittal schedule

Schedule reviewed by A/E, GSA, and CMa

Refer to specifications for submission requirements

REFERENCES

Sample Submittal Schedule

This page applies to:

☑ Traditional ☑ D/B ☑ D/B-Bridging ☑ CMc
### 7.1.2.0.1.2 Quality Assurance Quality Control Plans/Reports (QAQC Review Process)

- **GC/CC** submits project specific QAQC including inspection and report schedules
- **GSA, A/E, and CMa** review QAQC plan
- Is QAQC Plan accepted?
  - Yes: Project Team implements QAQC plan
  - No: GSA, A/E, and CMa review QAQC plan
- **Contractor** provides progress reports via regularly scheduled meetings

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

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

Provide feedback to contractor

Yes

Evaluate results

Accept?

No

Proceed and document

Yes

No

Refer to project specifications for requirements
Will project use Web-cam?

- Yes
  - Project Team determines type: still, video, time lapse, software, and system requirements
  - Project Team determines camera logistics: Internet service, location, and power
  - Coordinate security
  - Project Team determines users, access levels, and link to PIP
  - Implement
    - Typically managed by CMa

- No
  - Don't install
Requests for contract modifications are typically generated from three sources:

1. Tenant wants or needs
2. GSA programmatic change
3. GC/CC wants or needs

Verify funding source and availability.

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

Develop IGE

Analyze schedule fragnet

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

Is the request valid?

Yes

Obtain necessary funding documents

Issue RFP

GC/CC responds to RFP

CMa analyzes request proposal

Negotiate

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

No

Deny request

Contingency funds may be used only for errors or omissions!
Evaluations of contractor past performance are required under FAR.

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

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

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

The PM and CO typically complete the evaluations.

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

Go to the NIH Website and complete the evaluation form.

Contractor Past Performance Systems (CPPS) are required by FAR. GSA currently utilizes the NIH system for GC/CC/CMa evaluations. The A/E module is under construction by NIH.

LINKS

NIH Sample Evaluation Form

This page applies to:

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

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

Minimum requirements: at major design and construction milestones
Will require contractor's assistance for cost data
CMa may assist on this task

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

Is follow-up Partnering Session needed?

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

In-house Facilitator

CMa may hire consultant as provided in SOW

Project Team identifies in-house facilitator and determines availability

Project Team invites stakeholders and develops agenda

Project Team conducts Partnering Meeting

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

No further action required

No

Yes
7.0.0.0.0 Construction Design/Build-Bridging

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

Project Team coordinates with OCA

Is peer review required at 15% completion?

Yes

Project Team coordinates with OCA

OCA requests and Project Team completes survey form

OCA coordinates schedule and participates in peer review

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

Peer review team prepares report

Project team develops action plan

No

No peer review necessary

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

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

No peer review necessary

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

Project team develops action plan

OCA coordinates schedule and participates in peer review

OCA requests and Project Team completes survey form

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

LISTS

List of OCA Construction Excellence Council
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

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

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

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

---

Project Team determines when phases are to be awarded

Ensure that all contractors' schedules include overall project milestones

Verify and secure alternate funding sources if required

Award additional phases

CPM schedule examples
7.0.0.0.0 Construction
Design/Build-Bridging

7.1.14.0.0.0 Turnover Documents

Project
Team receives turnover documents

O&M Manuals
Submittal 7.1.14.3.0.0

Warranties
and Certifications
7.1.14.4.0.0

Material
Samples, Attic
Stock and Spare
Parts 7.1.14.6.0.0

Contractor
Record
Drawings 7.1.14.7.0.0

Review and accept turnover documents

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
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.b

Withhold percentage of payment
Proceed with Property Management Training

Pass or Fail?

Pass

Fail

Withhold percentage of payment

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

Proceed with Property Management Training

This page applies to:

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

GSA - Public Buildings Service

Construction Page 41
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?

Fail → Withhold percentage of payment

Pass

Contract Record Drawings 7.1.14.7.0.0

This page applies to:

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

LINKS

- Cx Plan
- PMP Reference
- Submittal Schedule/Logs/Submissions 7.1.6.4.0.0

GSA - Public Buildings Service  7.1.14.0.0.0

Construction Page 42
Using PMP, CMa/CxA establishes list of material samples, attic stock and spare parts

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

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

Submit material samples, attic stock and spare parts

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

Project Team reviews and comments

Pass?

No

Withhold percentage of payment

Yes

Complete

Property Manager is key player

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc
Using PMP, CMa/CxA establishes list of contractor record drawings required

Determine requirements for contractor record drawings

Identify who will receive and secure contractor record drawings

Submit contractor record drawings

Verify correct documentation/as-builts of contractor record drawings

Project Team reviews and comments

Pass?

No → Withhold percentage of payment

Yes → A/E or Contractor?

Contractor

A/E

Prepare record documents from contractor redlines

Complete and distribute as directed by Project Team

This page applies to:

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

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

Identify special testing equipment

Pass?

Yes

No

Substantial Completion Certification 7.1.15.0.0.a

This page applies to:

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

Yes

Complete

No

Withhold percentage of payment

This page applies to:

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

LINKS

- O&M Manual
- Submittals
- 7.1.14.3.0.0
7.1.15.0.0.0.b Substantial Completion Certificate: Final Cleaning

1. Establish schedule for final cleaning
2. Clean according to cleaning specifications in contract
3. Pass?
   - Yes: Closeout (Admin) 7.2.0.0.0.0
   - No: Make sure retention is held for final cleaning

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

LINKS
Substantial Completion Certificate: Final Completion 7.1.15.0.0.c
7.0.0.0.0 Construction
Design/Build-Bridging

7.1.16.0.0.0 Occupancy Permit

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
8.0.0.0.0.0.0 Occupancy
8.0.0.0.0.0 Tenant Occupancy

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
Food Service will require outside permits

Receive elevator permits

Other environmental parties

Determine security testing responsibilities and request final testing

GSA Passes?
Yes
Building occupancy

No
Make Corrections
Return to pass/fail

FPS/USMS Passes?

No

Yes

LINKS

Punch Lists 7.1.14.1.0.0.b
Systems Startup and Testing 7.1.14.2.0.0

O&M Manual Submittals 7.1.14.3.0.0
Substantial Completion Certificate Final Completion 7.1.15.0.0.0.c

This page applies to:

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

GSA - Public Buildings Service 7.1.16.0.0.0
Construction Page 49
7.1.14.1.0.0.a Final Inspections

1. CMa/CxA performs the following duties as directed by the Project Team (PMP)
2. Initiate Punch List
3. Identify who will conduct final inspection and include tenant
4. Schedule final inspection
5. Develop format for final inspection
6. Perform final inspection
7. Inspect Passed?
   - Yes: Start closeout process
   - No: Develop lists and send to contractor

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

7.14.1.0.0.b Punch Lists

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
7.14.1.0.0.b Punch Lists
8.0.0.0.0.0 Tenant Occupancy

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

Schedule inspections

Project Team identifies who will conduct inspections

Develop format for punch list 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

Contractor corrects

Other forces correct?

Yes

This page applies to:

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

Substantial Completion Certificate: Final Completion
7.1.15.0.0.0.c

Substantial Completion Certification
7.1.15.0.0.0.a

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

GSA - Public Buildings Service 7.14.1.0.0.b Construction Page 51
7.0.0.0.0 Construction
Design/Build-Bridging

7.15.0.0.0.c Substantial Completion Certificate: Final Completion

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
7.15.0.0.0.c Substantial Completion Certificate: Final Completion
8.0.0.0.0 Tenant Occupancy

Contractor completes all tasks

Yes

Pass?

No

Receive turnover documents

Complete and accept final inspections

Receive occupancy permits

Receive and complete substantial completion certification

Complete final cleaning

Issue Substantial Completion Certificate 7.15.0.0.0.a

LINKS

Turnover Documents 7.14.0.0.0
Final Inspections 7.14.1.0.0.a
Punch Lists 7.14.1.0.0.b

Systems Start-up and Testing 7.14.2.0.0
O&M Manuals Submittal 7.14.3.0.0
Substantial Completion Certificate: Final Cleaning 7.15.0.0.0.b

Occupancy Permit 7.16.0.0.0

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/CC Option)

A/E Record Documents

Updated PBS CAD Library Submission

Contract Closeout (GC/CC)

Project Management Closeout

Financial Closeout

Dedication Ceremony Documents

Project Awards (LEED, EnergyStar, AIA, PM, etc.)
8.3.4.0.1.2 Maintenance and Cleaning Contracts (GC/CC Option)

CO executes Maintenance and Cleaning Option

Will government utilize option or procure new contract?

Yes

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

No

Refer to PM criteria

Conservators of art

Special requirements (e.g., environmental)

LINKS

- PMP Reference
- O&M Manuals 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 Completion 7.1.15.0.0.0.c
- Substantial Completion Certificate: Final Cleaning 7.1.15.0.0.0.b

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc
A/E Record Documents

Receive as-built documents from GC/CC

CMa verify redlines are up to date

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

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

Ensure PBS CAD standards are enforced 7.2.2.0.0

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

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

Cx Plan establishes quality control for verification of as-builts

QAQC should also address A/E Record Documents

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc
7.2.2.0.0.0 Updated PBS CAD Library Submission

Project Team receives A/E Record Documents

Regional CIO or librarian accepts submission

Back check format and content

Is everything there?

Yes → Proceed to Project Closeout

No → A/E takes corrective action

QAQC should address CAD Library submissions

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

Planning

Authorization/Funding

Site Acquisition

Design/Build

Design

Construction

Dedication Ceremony Documents

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:

- Project Team contacts Customer Service/Marketing to advise of project completion
- Contact marketing department to notify of completion
- Contact appropriate parties to establish ceremony date
- Establish ceremony committee
- Identify source of funds
- Identify number of attendees to schedule facility
- Develop invitation list
- Provide fact sheets for press releases
- Identify stage/dais size and procure
- OCA will coordinate preparation of “white books” for the Dedication Ceremony
- Pay invoices and release claims
- Tear down facility
- Write purchase orders for procured items
- Set up facility
- Procure mementos
- Obtain religious figures for invocation and benediction
- Obtain a band
- Print and mail invitations
- Develop program
- Identify source of funding for refreshments
- Identify sound and lighting system and procure
- Project CO typically manages these actions with PM CO

Project funds, RWA, community, etc.

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc
7.2.5.0.0.0 Project Awards (LEED, EnergyStar, AiA, PM, etc.)

Project Team provides information for award criteria

- LEED
- EnergyStar
- AiA
- PM
- GSA Design Awards (Biennial)

Cx Plan/Report
A/E
OCA

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

Compete final cleaning

Verify completion of contract(s)

CMA submits final report

All claims resolved/release of claims received?

Yes

CO receives final invoice and Release of Claims (GSA Form 1142)

No

Identify scope of claim

Determine resolution process (negotiation, ADR, GSBCA, court of claims)

Project Team verifies Substantial Completion Certificate: Final Cleaning

7.1.15.0.0.0.b

7.0.0.0.0.0 Construction Design/Build-Bridging

7.2.3.1.0.0 Contract Closeout (GC/CC)

Project Management Documents

Planning

Authorization/Funding

Site Acquisition

Design/Build

Design

Construction

7.1.15.0.0.0.c

7.1.15.0.0.0.b

7.1.15.0.0.0.a

Release of Claim (GSA Form 1142)

Substantial Completion Certificate: Final Completion

7.1.15.0.0.0.c

This page applies to:

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

Closeout (Admin) 7.2.0.0.0.0

GSA - Public Buildings Service 7.2.3.1.0.0

Construction Page 59
Some of these processes/tasks are concurrent.
7.0.0.0.0.0 Construction
Design/Build-Bridging
7.2.3.2.0.0 Financial Closeout

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

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

Project Team completes tasks for financial closeout

Close out RWAs if open

Return balance of funds to appropriate parties

Is interest due?

Yes

Pay interest

No

Retain for possible interest payments from final invoice

Pay

Process all final payments

Close out items from GSA Financial System

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

LINKS

RWA

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc
Project Team compiles project cost data

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

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

PBS Budget system commences depreciation

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc
New or revised tenant space

Begin preparation of OA

Extent/type of project?

Limited Scope

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

Substantial Completion Certificate 7.1.15.0.0.0.a

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

No OA required

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

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc
Prepare OA using FS estimate
Transmit OA to agency for review
Does agency agree?
Signed OA

Review requirements used to develop cost estimate
2.4.1.0.0.0.a

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

**OAs and RENT (Overview) 8.1.0.0.0.0**

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**LINKS**

- PBS Pricing Desk Guide
- Pricing Implementation for Project Management
- Feasibility 2.4.1.0.0.0.a
- Concept Design 6.7.0.0.0.0
- Design Development (Overview) 8.8.0.0.0.0
- Construction Documents 6.9.0.0.0.0
- Construction Procurement 6.10.0.0.0.0

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

Transmit OA to agency for review

Does agency agree?

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

No
Review requirements used to develop cost estimate in PDS

2.5.0.0.0.0

8.0.0.0.0.0 Tenant Occupancy

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

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc
Project Team conducts analysis to compare proposal costs to final design estimates.

Are budgets sufficient to cover construction proposal costs?

- Yes: Has the TI estimate changed?
- No: Stop procurement and reevaluate, i.e., obtain an RWA, negotiate with the contractor or redesign, etc.

Has the TI estimate changed?

- Yes: Revise OA using proposal costs
- No: Award contract

Award contract

Signed OA

Does agency agree?

- Yes: Can costs be reconciled for Shell and TI for Tenant(s)
- No: Redesign or cancel project

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

This page applies to:

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

LINKS

PBS Pricing Desk Guide
Pricing Implementation for Project Management

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

Design Development (Overview) 6.8.0.0.0.0
Construction Documents 6.9.0.0.0.0
Construction Procurement 6.10.0.0.0.0

(0% to 100% Construction) 7.1.0.0.0.0

8.0.0.0.0.0 Tenant Occupancy Design/Build-Bridging
8.1.1.2.2.0.b Occupancy Agreement (Accepted Draft): Before Construction Award
Project Team conducts analysis to compare design estimates with any changes during construction.

Is additional funding required?

- Yes
  - Stop procurement and reevaluate, i.e., obtain an RWA, negotiate with the contractor or redesign, etc.
  
- No
  - Proceed with construction

Revise OA

Transmit to agency for review

Does agency agree?

- Yes
  - Obtain signature

- No
  
  Stop procurement of Change Order and re-evaluate; i.e., obtain RWA, negotiate with GC/CC, re-design, etc.
  
  Find alternate solution or cancel Change Order.

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

OAs and RENT (Overview) 8.1.0.0.0
Applies all appropriate costs to space by ABC

Calculate RENT by ABC

Transmit to agency for review

Develop final OA

Are there any changes from last signed OA?

Does agency agree?

Yes

Signed OA

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

Initial Start RENT

Charge RENT and mediate with agency on outstanding costs

No

SOL

This page applies to:

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

GSA - Public Buildings Service

8.1.1.5.0.1 Final Occupancy Agreement

8.0.0.0.0.0 Tenant Occupancy

Design/Build-Bridging

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

8.1.1.5.0.0 Final Occupancy Agreement (Reconciliation)

8.0.0.0.0.0 Tenant Occupancy Design/Build-Bridging

8.1.1.5.0.0 Final Occupancy Agreement (Reconciliation)

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

8.1.2.0.0.0

Finalize project costs

Calculate RENT by ABC

Develop final OA (reconciliation)

Transmit to agency for review

Action Required

Does Agency agree?

Yes

Signed OA

Finalize OA in STAR

No

Are there any changes from final OA?

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

LINKS

PBS Pricing Desk Guide
Pricing Implementation for Project Management
Feasibility 2.4.1.0.0.0.a

PDS 2.5.0.0.0.0
Concept Design (Overview) 6.7.0.0.0.0
Design Development (Overview) 6.8.0.0.0.0
Construction Documents 6.9.0.0.0.0

GC/CC Source Selection Plan 6.10.1.0.0.0
(0% to 100% Construction) 7.1.0.0.0.0
OAs and RENT (Overview) 8.1.0.0.0.0

GSA - Public Buildings Service

Initial RENT Start 8.1.3.0.0.0

Tenant Occupancy Page 9
8.0.0.0.0 Tenant Occupancy
Design/Build-Bridging

8.1.2.0.0 National CAD/CIFM Standards

1. Project Team identifies funding source(s)
2. Project Team reviews PMP and confirms potential resources for National CAD/CIFM Standards
3. CO awards contract option or task order for delivery of drawings
4. Contractor prepares National CAD/CIFM Standards IAW contract specifications and submits to GSA for review
5. Project Team reviews drawings and provides comments to contractor
6. Contractor incorporates comments and submits final CAD drawings to Project Team
7. Project Team receives CAD drawings and distributes to PBS library or regional CIO, field office, and tenants as appropriate

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

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

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

The network diagram illustrates the flow of steps in the process, with each step connected by arrows showing the sequence of actions. The potential resources section highlights the options available for funding, including A/E, GC/CC, or CMa contract options, or IDIQ task orders. The CMa services can be utilized at any point throughout the project process. The page concludes with a list of links and a note on the application of the page to different project types.
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.

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc
Discuss age of furniture and need for repair/replacement with tenant agencies

Agency inventories furniture and provides furniture layout in the design

Agency coordinates layout with design A/E

Agency procures, installs, and inspects furniture installation

Agency coordinates with Project Team

Integrate into CPM schedule

In-house

Agency coordinates with GSA field office for move of existing furniture

Agency

IN-HOUSE

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

A/E

Will agency use in-house sources or FSS?

FSS

Does tenant need new furniture?

Yes

No

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

Agency coordinates with GSA field office for move of existing furniture

Provide A/E estimate for inventory and furniture design

Obtain RWA from agency for furniture inventory and design

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

Federal Supply procures, installs, and inspects furniture installation

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

Provide A/E estimate for inventory and furniture design

Obtain RWA from agency for furniture inventory and design

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

Federal Supply procures, installs, and inspects furniture installation

AGENCY ASSUMES ALL RESPONSIBILITY FOR FURNITURE (obtain documentation from agency)
Determine age of telecommunications system and need for repair/replacement

Cost Estimates from FS

PDS Design Programming

Does tenant need new telecommunications system?

Yes

Telecommunications Contracts

No

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

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

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

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

Does tenant need new telecommunications system?

Agency procures, installs, and inspects telecommunications system installation

Project Management Documents

Planning

Authorization/ Funding

Site Acquisition

Design/Build

Design

Construction

Tenant Occupancy

Agency IT Data Systems

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

Telecommunications Contracts

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

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMC
Agency coordinates telecommunications system design A/E

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

Agency procures, installs, and inspects telecommunications system installation

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

Develop Telecommunications Contract

FTS procures, installs, and inspects telecommunications system installation

Tenant Telecommunications Requirements

Additional Phases Delivery (TI, Phases, Annexes) 7.1.13.0.0.0

CD Submission (60-76%)

Provide A/E estimate for inventory and telecommunications system design

Obtain RWA from agency for telecommunications system inventory and design

Will agency use in-house sources or FTS?

Agency coordinates telecommunications system design A/E

In-house layout with design A/E

Agency procures, installs, and inspects telecommunications system installation

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

In-house

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

Will tenant use in-house sources for inventory and design or A/E?
Tenant provides requirements for cabling and infrastructure

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

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

Integrate into CPM schedule

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

Telecommunications Installation – R&A 8.2.2.0.0.0.a

DD Submission (35%) 6.8.5.0.0.0

CD Submission (60-76%)

Additional Phases Delivery 7.1.13.0.0.0

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

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc
8.2.4.0.0.0 Security Systems Installation

8.2.4.0.0.0 Tenant Occupancy Design/Build-Bridging

**Project Team commences major security discussion in preparation for PDS**

**Does tenant need new security system?**

- **No**
  - Only general building security is provided for tenant and documented in OA
- **Yes**
  - **In-house**
    - Agency coordinates security system design with A/E
  - **FPS**
    - Agency procures, installs, and inspects security system installation

**Will agency use in-house sources or DHS FPS?**

- **In-house**
  - A/E provides security system design
  - Obtain RWA from agency for security system design
  - Provide A/E estimate for security system design
  - DHS FPS reviews and GSA procures, installs, and inspects security system installation
  - DHS FPS tests, inspects, and accepts security system

- **FPS**
  - A/E provides security system design
  - Obtain RWA from agency for security system design
  - Provide A/E estimate for security system design
  - DHS FPS reviews and GSA procures, installs, and inspects security system installation
  - DHS FPS tests, inspects, and accepts security system

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

- **In-house**
  - Agency coordinates security system design with A/E
- **A/E**
  - A/E provides security system design

**Security**

- **Design/Build-Bridging**

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

**Links**

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

**Additional Phases Delivery**

- Security Design Requirements 6.8.5.0.0.0
- CD Submission (60-75%) 7.1.13.0.0.0
- DD Submission (35%) 6.8.5.0.0.0

**This page applies to:**

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

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GSA - Public Buildings Service 8.2.4.0.0.0
A/E provides design IAW with 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

CONTACT USMS

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

Survey existing space

Survey furniture and equipment

Establish move-in schedule

Establish responsibilities

Responsibilities, costs, funding, and schedules established

Establish cost

Who will perform the move?

Tenant

GSA

Tenant coordinates move schedule with GSA property manager

Establish scope

Survey existing space

Survey furniture and equipment

Establish move-in schedule

Establish responsibilities

Responsibilities, costs, funding, and schedules established

Establish cost

Who will pack?

Tenant

GSA

GSA provides boxes, labels, and instructions for destination

Tenant

Obtain quotes from move vendors

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

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GSA

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