PM Guide

Traditional
Design/Build (D/B)
Design/Build-Bridging (D/B-B)
Construction Manager as Constructor (CMc)
1.0.0.0.0 Project Management
Documents

2.0.0.0.0 Planning

3.0.0.0.0 Authorization/
Funding

4.0.0.0.0 Site Acquisition

5.0.0.0.0 Design/Build

6.0.0.0.0 Design

7.0.0.0.0 Construction

8.0.0.0.0 Tenant

Occupancy

2.0.0.0.0 Planning

Design/Build-Bridging

2.0.0.0.0 Planning

PRE-PROJECT PLANNING

(PRELIMINARY)

PLANNING

2.1.0.0.0.1

SITE ACQUISITION

4.0.0.0.0.a

ENVIRONMENTAL/
NEPA COMPLIANCE

2.3.0.0.0

FEASIBILITY

2.4.1.0.0.0.a

PDS

2.5.0.0.0

RELOCATION
PLANNING

2.6.0.0.0

LINKS

This page applies to:

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

Pre-Project Planning
(Overview)

2.1.0.0.0

GSA - Public Buildings Service

2.0.0.0.0

Planning Page 1
2.0.0.0.0 Planning
Design/Build-Bridging
2.1.0.0.0 Pre-Project Planning (Overview)

Is it a capital project?

No
ABT prioritizes in small projects process (BA54)

Yes
Commence FS
2.4.1.0.0.0.a

Select the best alternative

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

Traditional or CMC
Design/Build Bridging
Design/Build
Lease Construction

Site and Design Prospectus Submission
Submit Site Prospectus
Design/Build PDS

Site and Design Authorization
Design/Build Prospectus Submission
Design/Build Authorization

PDS
2.5.0.0.0.0

Construction Prospectus Submission

Construction Authorization
3.4.0.0.0.0

Overview of Capital Investment and Leasing Program (CILP) process

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

LINKS

Project Coordination
1.1.0.0.0.0.a

This page applies to:

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

Design/Build-Bridging

1.1.0.0.0.a Project Coordination

Assemble Project Team
1.1.0.0.0.a

PM
1.1.0.0.0.b

Design Start-up Workshop
6.1.0.1.0

PIP

Project Website(s)
1.1.5.0.0.0

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LINKS

Pre-Project (Preliminary) Planning
2.1.0.0.0.1

Feasibility
2.4.1.0.0.0.a

PDS
2.5.0.0.0.0

Site Acquisition
4.0.0.0.0.0.a

This page applies to:

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

GSA - Public Buildings Service

1.1.0.0.0.0.a

Planning Page 4
1.0.0.0.0 Project Management Documents

1.1.0.0.0.a Project Management
Plan:
Assemble Project Team

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

*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

---

**1.0.0.0.0.0 Project Management Documents**

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

Asset Manager assembles Project Team

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

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

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**LINKS**

Pre-Project (Preliminary) Planning 2.1.0.0.0.1
NHPA 2.2.0.0.0.0
NEPA 2.3.0.0.0.0

Feasibility 2.4.1.0.0.0.a
PDS 2.5.0.0.0.0
Site Acquisition 4.0.0.0.0.0.a

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

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GSA - Public Buildings Service

Existing Conditions Assessments 2.1.12.0.2.0

Planning Page 5
2.0.0.0.0 Planning
Design/Build-Bridging

2.1.12.0.2.0 Existing Conditions Assessments

- Project Team reviews existing information

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

- No

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

Feasibility 2.4.1.0.0.0.a
Local Portfolio Plans

Project Team reviews appropriate LPP

Will the agency request be satisfied within existing inventory?

Is it a capital project?

Project Team will study viable alternatives in FS 2.4.1.0.0.0.a

ABT will prioritize in small projects process (BA54)

PDS if D/B 2.5.0.0.0

LPPs are utilized by ABT to understand the overall inventory (leased and owned) and to determine if space requests may be satisfied in the existing inventory. If not, the ABT may choose to initiate a FS. LPPs are typically prepared in-house by the Asset Manager.

Is it a capital project?

Yes

No

Will the agency request be satisfied within existing inventory?

Yes

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.

Would an updated Master Plan benefit the project?

- Yes
  - Project Team develops scope, obtains funding, and issues work order for Master Plan
  - Project Team confirms clients’ short-term and long-term needs
  - Update Master Plan as appropriate

- No
  - Respond to individual requests independently
Is it necessary to proceed to next level?

Yes

Complete Level 4 BER to support capital project submission

No

Project Team reviews existing BER

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

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

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

Use Project Consultant Task Order 6.1.0.0.0.0

Include in FS Scope 2.4.1.0.0.0

Include in PDS if D/B 2.5.0.0.0
Planning Documents

Accessibility Survey

Project Team consults with Regional Accessibility Officer to determine existing information

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

Is additional information needed?

Yes → Obtain additional studies

No → Incorporate accessibility work items into project scope

Use Project Consultant Task Order 6.1.0.0.0.a

Include in FS Scope 2.4.1.0.0.a

Include in PDS if D/B 2.5.0.0.0

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

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

GSA - Public Buildings Service 2.1.4.0.0.0 Planning Page 10
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
Hazardous Materials Surveys are used to track and account for the presence of hazardous substances and to identify remediation, if required. In R&A projects, surveys identify the hazardous materials present and the associated costs for remediation. Surveys are also used in field office O&M plans.

Project Team consults with Regional IH to determine existing information

Is additional information needed?

Yes

Obtain additional information

No

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

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
2.1.6.0.0 Highest and Best Use Appraisal (R&A)

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

Yes

Obtain updated appraisal

No

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

Regional term contract

Use Project Consultant Task Order 6.1.0.0.0.0.a

Include in FS Scope 2.4.1.0.0.0.a

Include in PDS if D/B 2.5.0.0.0.0

Project Team reviews current ABP
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.

This page applies to:

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

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

2.1.9.0.0.0 Energy Conservation Audit

Project Team consults with Regional Energy Coordinator to determine existing information

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

Is this an existing building?

Yes

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

No

Develop energy usage targets for new construction with central office

Is there an existing building energy audit?

Yes

Conduct energy audit

No

Use Project Consultant Task Order 6.1.0.0.0.0.a

Include in FS Scope 2.4.1.0.0.0.a

Include in PDS if D/B 2.5.0.0.0.0

LINKS

Energy Center of Expertise
HVAC Excellence and Specification
PBS-P100

This page applies to:

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

GSA - Public Buildings Service

2.1.9.0.0.0

Planning Page 15
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.

Links

- DEP&P: GSA Guidebook I – Acquisition of Real Property
- GSA Guidebook II – Relocation of Residents and Businesses: NEPA
- NHPA: PBS Pricing Desk Guide, Pre-Project Planning Guide
- Pricing Implementation for Project Management: Professional Services Estimating Tool
- PMP 1.1.0.0.0.b: Pre-Project (Preliminary) Planning 2.1.0.0.0.1, Existing Conditions Assessments 2.1.12.0.2.0
- Site Acquisition 4.0.0.0.0.0.a: OAs and RENT (Overview) 8.1.0.0.0.0

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

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

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

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

Develop preliminary Cx Plan and required budget in FS.

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

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

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

LINKS

Building Cx Guide  PBS-P100  PPT

This page applies to:

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

CMa Scope of Work
6.3.1.0.0.a

Cx A SOW
(if apart from CMA)
6.3.1.0.0.b
6.0.0.0.0 Design
Design/Build-Bridging

6.1.0.0.0.a Project Consultant Task Order

Special Project Consultants may be needed throughout the project process

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

Project Team develops SOW

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

CO issues IGE

CO issues RFP

CO receives proposals

CO evaluates proposals and prepares PNP

CO completes contract evaluations and advises Project Team of pending award

CO awards Project Consultant Contract

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

IDIQ, FSS or stand-alone contract

This page applies to:

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

LINKS

Acquisition Plan  FS  PDS

PMP Reference  Sample PNM  Sample PNP
2.0.0.0.0 Planning

Design/Build-Bridging

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

4.0.0.0.0.0 Site Acquisition

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

PROJECT TEAM

Project Team defines need for capital project

Is site ACQ required for capital project?

Yes

ACQ required for capital project

No

No further action required

PROJECT TEAM

*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 further defines site ACQ criteria

Project Team develops SOW for FS

Include in PDS if D/B

2.5.0.0.0.0

DA justification

Municipality discussion documentation

Existing/Adjacent site soils report

Preliminary site development cost estimate

Fact Sheet on Executive Order 13006

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.c Site Investigation for FS

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

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

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

Concurrent Activities

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

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

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

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

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

LINKS

DEP&P
- GSA Guidebook I – Acquisition of Real Property
- GSA Guidebook II – Relocation of Residents and Businesses

NEPA
- NHPA
- PBS-P100

PMP: Assemble Project Team
- 1.1.1.0.0.0.a

PMP
- 1.1.1.0.0.0.b

Planning
- 2.0.0.0.0

Relocation Planning
- 2.6.0.0.0

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

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

Incorporate mitigation into design documents

Monitor MOA/PAs and mitigation throughout project delivery

RHPO updates Project Team as needed

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

Copy of MOA/PA to Advisory Council on Historic Preservation

This is an ongoing rather than an ending process

LINKS

Fact Sheet on Executive Order 13006
GSA Guidebook I – Acquisition of Real Property

GSA Guidebook II – Relocation of Residents and Businesses
NEPA

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

Planning 2.0.0.0.0
Relocation Planning 2.6.0.0.0.0

This page applies to:

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

2.3.0.0.0 NEPA Tasks for FS through Site Acquisition

**includes diagram**

This page applies to:

- Traditional
- CMC
- D/B
- D/B-Bridging
2.0.0.0.0.0 Planning
Design/Build-Bridging

2.6.0.0.0.0 Relocation Planning

Coordinate with RHPO and NEPA Coordinator as issues are identified

Identify potential project sites and impacts from resident/business displacement

Review housing plan and tenant needs/requirements

Is there site-related relocation or swing space?

Review cost and schedule impacts for viable alternative sites

Incorporate relocation issues into site cost estimate for FS

Complete FS and prepare Site and Design Prospectus

Update FS estimates during PDS for Construction Prospectus submission

Swing space

Identify the phasing plan assessing unique tenant requirements

Review cost and schedule impacts of required phasing/swing space

Prepare required lease AQP

Incorporate phasing/swing costs into FS and project budget

Or

Compile site data and prepare Site Prospectus if D/B

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 2.0.0.0.0.0.a
Site Acquisition 4.0.0.0.0.0.a

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

Design/Build-Bridging

1.1.1.0.0.0.b Project Management Plan (PMP)

- PM coordinates PMP development with Project Team
- Incorporate HCAM/TMP
- The PMP provides the overall framework for the project execution. This becomes the communication tool for all stakeholders and establishes customer expectations and draft OA parameters.
- PMP establishes resources, schedule, and budget
- PM leads review and update of PMP, including approvals
- Confirm customer expectations, including OA reviews/updates

PMP defines project delivery method and procurement strategies

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**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

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GSA - Public Buildings Service

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

Traditional    CMc    Design/Build Bridging    Design/Build

Project Team selects delivery method.

Project Team discusses procurement strategies based on selected delivery method.

A/E    CMa    CxA

GC    CMc    Design/Build    Design/Build Bridging

CO prepares draft AQP for inclusion in draft PMP.

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

LINKS

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

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

- **A/E**
  - General Contractor (GC) or Construction Contractor (CC)

- **A/E Source Selection**
  - 6.2.0.0.0.0

- **Traditional**
  - General Contractor 6.10.0.0.0.0

- **CMc**
  - Construction Contractor 6.10.0.0.0.0

- **D/B**
  - Construction Contractor 6.10.0.0.0.0

- **D/B-Bridging**
  - Construction Contractor 6.10.0.0.0.0

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

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

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

**D/B hires A/E**

**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.**

**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**

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

**Project Team will determine when the CMc contract is awarded. To achieve maximum benefits of their expertise, the CMc should be hired concurrently with the A/E.**

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

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

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

**The level of services provided by each contractor will be determined by the Project Team as they refine the pertinent SOWs**
REQUIRED PROFESSIONAL SERVICES FOR CAPITAL CONSTRUCTION PROJECTS:

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

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

**Art-in-Architecture (AiA)**
- Design Task
- Order concurrent with A/E NTP
- 6.1.0.0.0.0.b

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

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

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

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

AiA Concept Design
- 6.7.14.0.1.0

AiA Fabrication Task Order
- 7.1.4.0.0.0

AiA Deliverable
- 7.1.12.0.0.0

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

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

Design/Build-Bridging

1.1.3.1.0.0 Initiate Project in PIP

1.1.3.1.0.0 Initiate Project in PIP

Create project in database

Utilize PMP template

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

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

Refer to annual CILP instructions
1.1.3.2.0.0 Project Updates in PIP

- Project Team identifies who has editing authority
- Update at least monthly
- Utilize PIP as a major communication tool for Project Team and management
- PIP is used by all levels within GSA and outside customers to view project status

**LINKS**

- Initiate Project in PIP 1.1.3.1.0.0

**This page applies to:**

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

1.1.5.0.0.0 Project Website(s)

- Project team evaluates use of ePM software and/or custom Websites
- Coordinate training/review with internal and external Project Team members
- Coordinate ePM and/or Website with GSA and tenant agency document security requirements
- Define and implement ePM/Websites

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

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

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

GSA - Public Buildings Service

This is for sensitive but not classified documents.
This page applies to:

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

3.0.0.0.0.0 Authorization/Funding

Design/Build-Bridging

2.4.4.0.0.0 Project Funding Request

3.4.5.0.0.0 Budget Authorization Act (Congressional Approval)
1.0.0.0.0 Project Management Documents

Design/Build-Bridging

6.1.0.1.0 Courthouse Orientation and Design Start Workshop

---

**OCA issues site and design directive**

- Regions formally appoint PM (if not previously appointed)

**PMs invited to workshops sponsored by the OCA**

**PM assemblies Project Team (Transition is made from ABT)**

**Present PMP to OCA representatives and GSA peers (PMs)**

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

**PMs update PMP as needed**
2.0.0.0.0 Planning
Design/Build-Bridging

2.5.0.0.0 Program Development Study (PDS)

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

Project Team formalizes strategy to complete PDS
Assess supporting documents
Implement PDS procurement strategy
Regional ABT prepares draft construction prospectus
Complete PDS

Use Project Consultant Task Order 6.1.0.0.0.a
Does timing allow use of DE A/E?

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

No

Update PMP, OAs, and PDR 8.1.1.3.0.0
Update cost estimates
Review security threat and risk analysis
Incorporate additional site and environmental findings
Update design directives

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

If R&A: Verify and revise FS estimate. Create uniform/Level III by Shell and TI.
If New Construction: Review and update benchmarks.

LINKS
Project Planning Guide (PPG)  Project Coordination 1.1.0.0.0.a
Pre-Project (Preliminary) Planning  Feasibility 2.4.1.0.0.0.a

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

- Traditional
- Design/Build-Bridging
- OMB

**3.0.0.0.0 Authorization/Funding**

**Design/Build-Bridging**

**3.4.0.0.0 Construction Authorization (Prospectus)**

1. Regions submit draft construction prospectus based on CILP requirements
2. Central Office reviews and prioritizes submissions
3. Central Office submits prospectus to OMB
4. Region obtains funding and awards construction contract
5. Region submits allowance request to Central Office
6. Central Office obtains funding
7. OCA hosts construction start workshop
8. Congress approves construction budget
9. OMB includes construction prospectus in President's budget
10. This includes House and Senate authorization and appropriation

- Project to be resubmitted in future FY
- OMB passback

**This page applies to:**

- Traditional
- Design/Build-Bridging
- OMB

GSA - Public Buildings Service

Planning Page 40
Procurements proceed based on the strategies in the PMP and IAW with funding guidance and the Site/Design Directives letter.
6.0.0.0.0 Design
Design/Build-Bridging

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

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

**Links**
- DEP&P
- PBS-P100
- Fact Sheet on Executive Order 1306
- Pre-Project (Preliminary) Planning 2.1.0.0.0.1
- Relocation Planning 2.6.0.0.0.0

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

---

**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**

**NEPA 2.3.0.0.0.0**

Regional NEPA Coordinator proceeds on ESA

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

**ROD or FONSI concludes NEPA consultation process**

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

**Site Investigation 4.0.0.0.0.b**

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.**
6.0.0.0.0 Design
Design/Build-Bridging
4.2.0.0.0 Site Acquisition (Overview)

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

Construction Award cannot occur without clear title to site

Site Selection Process
- Determine DA and advertise for sites
- Evaluate sites
- Select top 3 sites
- Announce site selected
- Make site offers
- Clear title

Acquire site

Site Selection Team completes formal Site Selection Process

NHPA/NEPA
- Conduct ESA Phase 2 sampling
- Complete NEPA and NHPA
- Is this ROD or FONSI?
  - FONSI
    - Develop costs to clean property
    - Incorporate mitigation into design documents
  - ROD
    - NEPA complete
      - Review and approve final appraisal
      - Deduct cost to clean property
      - Determine final property valuation

ESAs completed
- Are there site concerns?
  - No
    - Contract for appraisal
    - Perform BTU survey
  - Yes

Review draft appraisal
- Complete survey

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

LINKS

<table>
<thead>
<tr>
<th>FS</th>
<th>PDS</th>
<th>PMP Reference</th>
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<tbody>
<tr>
<td></td>
<td></td>
<td>A/E Source Selection/ Evaluation Process 6.2.2.0.0.0</td>
</tr>
</tbody>
</table>

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

GSA - Public Buildings Service
6.2.0.0.0.0
Design Page 4
6.2.1.0.0.a A/E Services Scope of Work (Overview)

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

Project Team confirms project goals and objectives with all stakeholders

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

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

Comments are incorporated into SOW as appropriate

Project Team finalizes SOW

Project Team prepares 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

This page applies to:

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

Source Selection Plan 6.4.2.0.0
6.0.0.0.0 Design
Design/Build-Bridging

6.4.2.0.0.0 Source Selection Plan

- OCA issues Site/Design Directives
- Project Team implements A/E Source Selection Strategy approved in PMP
- The GSA PM may not be a member of the board.
- Two-Stage Selection
- 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-Stage Selection plus Design Charrette
- Three-Stage with Design Competition
- 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
- Coordinate with CO, OCA and Legal

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.

Links
- Acquisition Plan
- DEP&P
- FAR
- GSAM
- PIP template for PMP
- PMP Examples
- Samples of Selection Plans

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc
6.2.1.0.0.0.b Design Charrette (Optional)

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

Issue Task Order for Professional Advisor to manage the Design Charrette

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

Conduct Phase II interviews and Design Charrette as detailed in PMP

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

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

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

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

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

Project Team conducts a Design Competition IAW DEP&P

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

Coordinate Planning with OCA and Competition Advisor and Hold Vision Competition

Blind Evaluation of Vision Competition by Independent Jury of National Peers

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

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

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

Final Selection by the GSA Regional Selection Authority

LINKS

DEP&P

This page applies to:

☑️ Traditional ☐ D/B ☐ D/B-Bridging ☑ CMc
6.0.0.0.0 Design
Design/Build-Bridging
6.2.0.0.0, 6.2.4.0.0.0, and 6.2.5.0.0.0 A/E Source Selection/Evaluation Process

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
3.0.0.0.0.0 Authorization/Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design/Build
6.0.0.0.0.0 Design
6.2.2.0.0.0 6.2.4.0.0.0
6.2.5.0.0.0 A/E Source Selection/Evaluation Process
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy

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

Project Team receives approved SSP and commences A/E selection

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

Conduct pre-proposal conference to discuss the scope of services required by GSA, the A/E selection process, and the project delivery process

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

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

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

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

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

Schedule Interviews with short-listed A/Es

Receive Phase II submissions

Advertise for Design Architect – Bridging Design Services

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

Yes

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

A/E Board conducts a Design Charrette

Design Competition

Or

LINKS

A/E Advertisement
A/E Evaluation Board Report

Acquisition Plan
DEP&P
FAR

GSAM
Notification Letters to A/E Firms

PMP Reference
Sample SSP
A/E Procurement (Overview) 6.2.0.0.0.0

This page applies to:

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

GSA - Public Buildings Service 6.2.2.0.0.0 Design Page 9
GSA Project Team meets with A/E to review project goals and objectives

GSA issues initial SOW to A/E

Meet with A/E to review SOW

Revise SOW

Update government fee estimate

Request proposal

Receive and review proposal

Prepare technical evaluation including PNP

PM/CO conduct negotiation with A/E

Prepare PNM

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

Award A/E contract and compile contract file

AIA Contract 6.1.0.0.0.0.b

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

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

Request audit for salary rates and OH

LINKS

Sample PNM

Sample PNP

A/E Procurement (Overview) 6.2.0.0.0

This page applies to:

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

CMA/Commissioning Authority(Cx) Services 6.3.0.0.0
**6.0.0.0.0 Design**

**Design/Build-Bridging**

### 6.3.1.0.0.0.a CMa Scope of Work

[Diagram of CMa Scope of Work]

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

---

**LINKS**

- CMAA Standards
- DEP&P
- HVAC Excellence
- LEED
- PBS-P100
- Pricing Implementation for Project Management
- SOW Examples

**This page applies to:**

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

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

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
3.0.0.0.0.0 Authorization/ Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design/Build
6.0.0.0.0.0 Design
6.3.1.0.0.0.b Cx Scope of Work (if apart from CMa)
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy

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.

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

GSA - Public Buildings Service
6.0.0.0.0 Design
Design/Build-Bridging

6.3.2.0.0.0 CMa Task Order/CxA Task Order

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

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

---

**PROJECT TEAM**

**CMa**

**SOW**

**6.3.1.0.0.0**

**Project Management Documents**

**2.0.0.0.0**

**Planning**

**3.0.0.0.0**

**Authorization/Funding**

**4.0.0.0.0**

**Site Acquisition**

**5.0.0.0.0**

**Design/Build**

**6.0.0.0.0**

**Design**

**6.3.2.0.0.0 CMa Task Order/CxA Task Order**

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**LINKS**

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</table>

**This page applies to:**

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

6.7.0.0.0 Concept Design (Overview)
6.0.0.0.0 Design
Design/Build-Bridging
6.7.0.0.0.1.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

Concept Design Review Comments 6.7.6.3.0.0

- OA Update 8.1.1.3.0.0
- The OCA review is concurrent with the final concept review

Prepare final concept submission

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 6.7.14.0.0.0

OCA prepares Commissioner’s final concept approval memorandum

Issue NTP for DD phase
6.0.0.0.0 Design
Design/Build-Bridging

6.7.2.0.0 Concept Design Partnering Workshop

Pre-planning

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

Setup

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.

Partnering workshop

Charter

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

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

Establish lines of communication and roles and responsibilities.

LINKS

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

This page applies to:

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

GSA - Public Buildings Service
Design Charrette 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
6.7.4.0.0.0 Design Charrette Documents
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy

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

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

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

1.1.0.0.0.0

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

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

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

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

GSA - Public Buildings Service

Design Page 19
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.

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

6.7.14.0.0.0 Final Concept Presentation to the Commissioner
6.7.15.0.0.0 Final Concept Approval Memorandum

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
3.0.0.0.0.0 Authorization/Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design/Build
6.0.0.0.0.0 Design
6.7.14.0.0.0 Final Concept Presentation to the Commissioner
6.7.15.0.0.0 Final Concept Approval Memorandum
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy

**LINKS**

PBS-P100 Concept Design Partnering Workshop 6.7.2.0.0.0

**This page applies to:**

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

---

**Concept Presentation to the Commissioner**

6.0.0.0.0 Design

6.7.14.0.0.0 Final Concept Presentation to the Commissioner

---

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

OCA issues Task Order for IGE

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

OCA will review and comment within 10 working days

Reconciliation of IGE and A/E estimate

**Is project within budget?**

- **Yes**
  - Schedule presentation to Commissioner
  - Coordinate meeting logistics
  - A/E and PM conduct presentation
  - OCA prepares Commissioner final concept approval memorandum
  - Issue NTP for DD phase
  - Preferred: include the presentation of the AIA 6.7.14.0.1.0

- **No**
  - Concept Design (Overview) 6.7.0.0.0.0
  - 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.
6.7.14.0.0 Design
Design/Build-Bridging
6.7.14.0.1.0 Art-in-Architecture Concept Design

**Art 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**

**Present final concept to art panel**

**Art panel approves concept?**
- Yes
- No

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

Query PMs from recently completed projects and determine if and how they were able to participate in local Utility Rebate Programs

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

Based on the data compiled, the Project Team will be better positioned to make informed business decisions early in DD
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 Planning
5.0.0.0.0 Design/Build
6.0.0.0.0 Design
6.8.1.0.0.0 DD Program Review Workshop
7.0.0.0.0 Construction
8.0.0.0.0 Tenant Occupancy

---

6.8.1.0.0.0 DD Program Review Workshop

Project Team should review PMP,Cx Plan and status of current programming. PMP strategy may indicate a need for the DD Workshop if certain program parameters are evident. 1.1.1.0.0.0.b

Is a workshop needed?

Yes

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

No

Verify scope and budget are within the approved prospectus

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

Based on the deliverables from the workshop or tenant meetings, proceed with DDs
6.0.0.0.0 Design
Design/Build-Bridging
6.8.2.0.0.0 DD Systems Selection Analyses

A/E defines and sizes base systems and alternatives

A/E performs life cycle cost analysis

DD Submission for Project Team review

Project Team makes system selections

OCA HVAC peer review

Must be aligned with LEED goals

LINKS

HVAC Excellence  PBS-P100  PMP Reference

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc
6.0.0.0.0 Design
Design/Build-Bridging
6.8.5.0.0.0 DD Submission (35%)

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

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

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

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

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

A/E will deliver the 35% DD submission as provided in the A/E SOW.
6.8.9.0.0 Construction Strategy/Phasing Plan

**Project Team will review PMP. Cx Plan, AQP to see if updates are required for the Construction Procurement Strategy and/or Construction Phasing Plans**

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

- **No**
  - Project Team will need to revisit their construction strategy. A brainstorming session with the Project Team, including A/E, 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
The DD Submission (35%) will be forwarded to OCA for an independent PBS-P100 Review. The OCA IGE is optional at this time.

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

OCA will review and comment within 10 working days

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

Final approvals will be issued by the PM/CO

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

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

No design discipline should start work on CDs until the project directive has been approved
7.0.0.0.0 Construction
Design/Build-Bridging

6.10.1.0.0.0 GC/CC Source Selection Plan

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 Source Selection Plan
8.0.0.0.0.0 Tenant Occupancy

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

Project Team reviews AQP and PMP
Prepares/updates AQP as needed
Recommendations: GSA and customer as voting members, A/E and CM as technical advisors.

Establish SSEB

Develop SSP Criteria

GC/CC Evaluation Factors (Phase I) 6.10.1.0.0
GC/CC Evaluation Factors (Phase II) 6.10.13.0.0

Draft SSP
Review with legal counsel if necessary

SSEB reviews and SSA approves SSP
Revise and resubmit

Is it approved?

Yes
Issue SSP

No

Options:

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

GSA - Public Buildings Service
6.10.1.0.0.0
Construction Page 3
6.10.2.0.0 Advertisement for Construction Services

Project Team reviews Acquisitions Plan, SSP and PMP

CO develops and issues FED BIZ OPS advertisement

Market project to prospective contractors

Coordinate solicitation/ RFP distribution following GSA document security policy

Announce date, place, and time for Pre-Proposal Conference 6.10.4.0.0
6.10.4.0.0.0 Pre-Proposal Conference

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

CO sets up SBA networking processes

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

PM/CO develops agenda

PM/CO conducts meeting and tour

CMa provides minutes/sign-in sheet to all attendees

Is another Pre-Proposal Conference necessary?

Proceed with Proposal Document Addenda 6.10.11.0.0.0

This page applies to:

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

GSA - Public Buildings Service 6.10.4.0.0.0 Construction Page 5
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
SSEB reviews SSP 6.10.1.0.0

Receive Phase I proposal

SSEB independently evaluates Phase I proposals

SSEB develops consensus ranking and issue report

CO notify offerors

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

SSEB independently evaluates Phase II proposals

Develop a competitive range

Interview those in the competitive range

SSEB determines final consensus scores and ranking

Are price proposals within available funds?

No

Develop negotiation strategy

Implement strategy

Offerors within the competitive range submit BAFO

Yes

SSEB Chairman drafts final report and issues to SSA for approval

Update OA prior to award 8.1.13.0.0

Notify offerors
1.0.0.0.0 Project Management Documents
2.0.0.0.0 Planning
3.0.0.0.0 Authorization/Funding
4.0.0.0.0 Site Acquisition
5.0.0.0.0 Design/Build
6.0.0.0.0 Design
7.0.0.0.0 Construction
6.10.14.0.0 Construction
6.10.15.0.0 Pre-NTP Documents (Bonds, Insurance, Security, etc.)

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

Project Team requests allowance from OCA/PBS Budget Office

Update OA 8.1.1.3.0.0

CO issues award and publishes award announcement

Initiate security clearance process of contractor personnel

Request bonds and insurance

Receive, review, and approve

CO issues NTP 7.1.1.0.0.0

The CDs can be conformed with all amendments as deemed appropriate

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

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

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

7.1.1.0.0.0 Notice To Proceed

CO issues NTP

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

Include partnering and construction kick-off information in NTP letter

Determine best option

Concurrent Meetings

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

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

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

This page applies to:

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

Sample NTP Letter

LINKS
6.0.0.0.0 Design
Design/Build-Bridging

6.9.0.0.0 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

- OCA performs
  independent review and
  optional estimate
  6.7.13.0.0.0

- 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

- Verify budget compliance by
  performing IGE

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

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

- Verify Shell and T.I., Validate
  Funding Sources

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

6.8.11.0.0.0

1.0.0.0.0.0 Project
Management
Documents

2.0.0.0.0.0 Planning
Documents

3.0.0.0.0.0 Authorization/
Funding

4.0.0.0.0.0 Site Acquisition
Documents

5.0.0.0.0.0 Design/Build
Documents

6.0.0.0.0.0 Design

6.9.0.0.0.0 Construction
Documents

7.0.0.0.0.0 Construction
Documents

8.0.0.0.0.0 Tenant
Occupancy

LINKS

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

This page applies to:

Traditional  D/B  D/B-Bridging  CMC

CD Program
Review
Workshop
(CD Start) /
(90%)  6.9.3.0.0.0
6.0.0.0.0 Design
Design/Build-Bridging

6.9.3.0.0.0 CD Program Review Workshop (CD Start)
6.9.10.0.0.0 CD Program Review Workshop (90%)

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

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

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

---

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

**Update OAs as needed**
6.0.0.0.0 Design
Design/Build-Bridging

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

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

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

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

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

Is the program within scope and budget?

No

Yes

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

OCA completes IGE to insure project is within budget

WIll OCA order IGE?

Yes

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

No

OCA completes compliance review, scope review and IGE

Is the program within scope and budget?

OCA provides feedback to regions for the 100% CD submission

Update OAs as needed 8.1.1.3.0.0

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

1.0.0.0.0 Project Management Documents
2.0.0.0.0 Planning
3.0.0.0.0 Authorization/Funding
4.0.0.0.0 Site Acquisition
5.0.0.0.0 Design/Build
6.0.0.0.0 Design
6.7.13.0.0.0 Independent OCA PBS-P100 Review and IGE (Optional) (90% CDs)
7.0.0.0.0 Construction
8.0.0.0.0 Tenant Occupancy

LINKS
PBS-P100
PMP Reference
Professional Services Estimating Tool

This page applies to:

☐ Traditional  ☒ D/B  ☒ D/B-Bridging  ☒ CMa
6.0.0.0.0 Design
Design/Build-Bridging

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

CMa and Project Team reconcile scope or costs as needed

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

A/E updates checklists as needed

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

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

Is the program within scope and budget?

Yes

Update OAs as needed 8.1.1.3.0.0

No

CxA review as specified in Cx Plan

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

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

Construction Officer will proceed with Construction Procurement when funds are authorized

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
3.0.0.0.0.0 Authorization/Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design/Build
6.0.0.0.0.0 Design
6.7.12.0.0.0 CMa’s CD Review/Estimate (100% CDs)
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy

LINKS
PBS-P100 PMP Reference Professional Services Estimating Tool

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

GSA - Public Buildings Service 6.7.12.0.0.0 Construction Page 15
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.

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc
7.1.4.0.0 Art-in-Architecture Fabrication Task Order

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

Fabrication Task Order is issued based upon these discussions.

RFAO will coordinate with the artist and keep Project Team advised of any issues on budget or schedule.
7.0.0.0.0 Construction Design/Build-Bridging

7.1.2.0.0.0 Construction Kick-off Meeting

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

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

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

This page applies to:

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

7.1.3.0.0.0.a Partnering Session

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

Project Team discusses upcoming Partnering Session

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

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

Selection process: consultant or in-house?

Consultant

Issue a task order for Specialty Consultant 6.1.0.0.0.0.a

CMA may hire consultant as provided in SOW

In-house

Project Team identifies in-house facilitator and determines availability

Project Team invites stakeholders and develops agenda

Project Team conducts Partnering Meeting

Facilitator issues Partnering Charter and report from the meeting

---

**LINKS**

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

**This page applies to:**

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

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

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

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

Option B: Delaying partnering until after kick-off:

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

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

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

Consult with Office of Customer Service: Is groundbreaking needed?

Yes

Determine stakeholders and local dignitaries to invite to ceremony

Determine date of groundbreaking

Coordinate logistics

Have ceremony

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

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc
Project Team will assign roles and responsibilities for the project. Some of the following tasks may be performed by CMa/CxA as identified in respective SOW.

Project Team reviews and approves construction schedules 7.1.6.2.0.0

CMa prepares and monitors QA Plan 7.1.2.0.1.2

GC/CC installs project Web-cam 7.1.6.1.1.1

Project Team establishes system and monitors RFIs 7.1.6.0.0.1.c

CO processes progress payments law contract specifications and approved schedule

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

GC/CC prepares submittal schedule, Log and Submissions 7.1.6.4.0.0

CMa/CxA conducts or prepares inspection schedule/reports 7.1.6.5.0.0

PM/CO coordinate and manage contract modifications 7.1.6.8.0.0

CMa prepares special testing/mockup plans/reports

Project Team reviews and manages project costs 7.1.6.0.0.1.b

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

Project Team conducts regularly scheduled “progress” meetings. Project updates are provided by disciplines as needed. Special meetings may be called at the discretion of the Project Team.
7.0.0.0.0 Construction
Design/Build-Bridging

7.1.6.0.0.1.a Construction Administration: Safety

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
   7.1.6.0.0.1.a Construction Administration:
   Safety
8.0.0.0.0.0 Tenant
   Occupancy

This page applies to:

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

7.1.6.0.0.1.b Construction Administration: Project Cost Management

The project budget is established early on in the planning phase and addressed in the PMP. The firewall between Shell and TI budgets is established in the FS and confirmed in the PDS. The project budget should be updated throughout the project duration as events dictate.

1. Project Team reviews project budget
2. Update project budget with additional construction information
3. Periodically monitor and update budget based on change orders and projections
4. Update OAs to reflect construction changes as necessary
5. Update PIP to reflect construction changes as necessary

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

7.1.6.0.0.1.c Requests for Information (RFI)

Project Team develops process to manage RFIs

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

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

CMa prepares log and tracks the RFI

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

Responsible party reviews and responds

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

Respond to contractor

Contractor reviews response

Determine if response is a change order

Does response merit change order?

Yes

GC/CC Contract Modifications 7.1.6.0.0

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

No

GC/CC implements response

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

- GC/CC contractor submits preliminary CPM schedule
  - Review schedule
  - Is preliminary schedule accepted?
    - Yes
      - GC/CC submits baseline schedule
      - Project Team reviews baseline schedule
        - Provide feedback to contractor
        - Is baseline schedule approved?
          - Yes
            - Project Team establishes process for monthly CPM schedule updates and approvals
              - Construction payments must be based on monthly CPM schedule reviews and approvals. PM/CO will certify payments within the established process.
              - Update PIP with current payment and schedule information 1.1.3.2.0.0
                - PM/CO will note any special provisions for off-site stored materials
          - No
            - Provide feedback to contractor

The preliminary and baseline schedules are reviewed by a GSA, CMa, and/or outside scheduling consultant.
GC/CC contractor prepares and delivers submittal schedule

Provide feedback to contractor

Review 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

Schedule reviewed by A/E, GSA, and CMa

Refer to specifications for submission requirements

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

LINKS

Sample Submittal Schedule
7.0.0.0.0.0 Construction
Design/Build-Bridging

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

No

Project Team implements QAQC plan

Contractor provides progress reports via regularly scheduled meetings

Provide feedback to GC/CC

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

Refer to the A/E, CMa and Cx SOWs to verify that the QAQC plan complies with the specifications

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

This page applies to:

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

LINKS

Building Cx Guide Cx Plan PBS-P100

PPT Inspections and Testing Schedule 7.1.6.5.0.0
7.0.0.0.0 Construction
Design/Build-Bridging

7.1.6.5.0.0 Inspections and Testing Schedule

Do specifications require GC/CC or GSA testing?

GC/CC coordinates testing schedule

GC/CC inspects and tests

GSA inspects and tests

Project Team coordinates testing schedule with GC/CC and tenants

Coordinate testing schedule with CMa and tenants

Conduct test

Provide feedback to contractor; GC/CC correct deficiencies

GC/CC submits results reports to CMa

Yes

Periodically check tests to make sure there are no abnormalities

Pass?

No

Evaluate results

Proceed and file report

Yes

Accept?

No

Yes

LINKS

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

GSA - Public Buildings Service 7.1.6.5.0.0

Construction Administration 7.1.6.0.0.0.a
7.0.0.0.0.0 Construction
Design/Build-Bridging

7.1.6.6.0.0 Special Testing/Mock-up Plans/Reports

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
7.1.6.6.0.0 Special Testing/
Mock-up Plans/
Reports
8.0.0.0.0.0 Tenant
Occupancy

GC/CC identifies
special testing/mockup
plans/reports

Project Team reviews
contractor's mockup
testing/inspection
schedule

Contractor constructs
mockup

Contractor conducts
test/inspection

Contractor submits
results/reports to
GSA/CMA

Pass?

Yes

No

Provide feedback to
contractor

Evaluate results

Yes

No

Proceed and
document

Accept?

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc
7.0.0.0.0 Construction
Design/Build-Bridging
7.1.6.1.1.1 Project Web-Cam

Will project use Web-cam?

Yes

No

Don't install

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

This page applies to:
☑ Traditional ☑ D/B ☑ D/B-Bridging ☑ CMc
Requests for contract modifications are typically generated from three sources:

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

Contingency funds may be used only for errors or omissions!

- Develop IGE
- Analyze schedule fragment

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

Is the request valid?

- Yes
  - Obtain necessary funding documents
  - Issue RFP
  - GC/CC responds to RFP
  - CMa analyzes request proposal
  - Negotiate
  - Issue change order Types are: bilateral, PDL, and unilateral

- No
  - Deny request

Verify funding source and availability

GSA - Public Buildings Service
Evaluations of contractor past performance are required under FAR. Past performance evaluations are a part of future procurement evaluations criteria.

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

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

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

The PM and CO typically complete the evaluations.

Go to the NIH Website and complete the evaluation form.

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

LINKS

PMP 1.1.0.0.0.b
CMa SOW 6.3.1.0.0.0.a
The Project Team evolves over the life of the project. As contractors (A/E, CMA, CMc, Cx, GC/CC) and special consultants are hired, they become a part of the Project Team.

Project Team discusses need for a follow-up Partnering Session

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

Is follow-up Partnering Session needed?

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

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

Yes

No
7.1.8.0.0.0 Construction Excellence Peer Review (1st)
7.1.11.0.0.0 Construction Excellence Peer Review (2nd)

Is peer review required at 15% completion?

- Yes
  - OCA requests and Project Team completes survey form
  - OCA coordinates schedule and participates in peer review
  - Peer review team prepares report
  - Project team develops action plan
- No peer review necessary
  - Participants: A/E, CMa, GC, GSA, client representatives, and other consultants

Required for projects over $25 million; optional for projects under $25 million.
7.0.0.0.0 Construction
Design/Build-Bridging

7.1.12.0.0 Art-In-Architecture Deliverable

Is art integral to the construction?

Yes

Meet to determine responsibilities of artist and contractor

Determine schedule for art installation and incorporate into construction schedule

Fabricate and install art

Inspect and accept art installation

No

Coordinate schedule and placement with GC/CC

Schedule, shop drawings, submittals

This page applies to:

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

LINKS

AiA Fabrication Design Task Order 7.1.4.0.0.0
7.0.0.0.0 Construction Design/Build-Bridging

7.1.13.0.0.0 Additional Phases Delivery (TI, Phases, Annexes)

Project Team determines when phases are to be awarded

Ensure that all contractors' schedules include overall project milestones

Verify and secure alternate funding sources if required

Award additional phases

This page applies to:

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

**LINKS**

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

This page applies to:

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

GSA - Public Buildings Service 7.1.14.0.0.0 Construction Page 40
7.1.14.3.0.0 O&M Manuals Submittal

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

1.1.0.0.0.b

CMa/CxA establishes list of O&M Manuals

CMa/CxA schedules submission of O&M Manuals

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

CMa/CxA develops format for O&M manuals

Prepare O&M Manuals

Submit O&M Manuals

Review O&M Manuals

Comment

Pass or Fail?

Pass

Proceed with Property Management Training

7.1.14.5.0.0

Fail

Withhold percentage of payment

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc
Using PMP, CMa/CxA establishes list of warranties and certifications

Determine requirements for start date of warranties and certifications

Identify who will prepare and receive warranties and certifications

Prepare warranties and certifications

Submit warranties and certifications

Review warranties and certifications and report status to Project Team

Project Team reviews and comments

Pass or Fail?

Pass

Contract Record Drawings 7.1.14.7.0.0

Fail

Withhold percentage of payment

**LINKS**

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

**This page applies to:**

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

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

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

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

Submit material samples, attic stock and spare parts

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

Project Team reviews and comments

Pass?

Yes

Complete

No

Withhold percentage of payment

Property Manager is key player

This page applies to:

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

LINKS

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

Determine requirements for contractor record drawings

Identify who will receive and secure contractor record drawings

Submit contractor record drawings

Verify correct documentation/as-builts of contractor record drawings

Project Team reviews and comments

Pass?

No

Withhold percentage of payment

Yes

A/E or Contractor?

Contractor

A/E

Prepare record documents from contractor redlines 7.2.1.0.0.0

Complete and distribute as directed by Project Team

This page applies to:

- Traditional
- A/E
- C/M
- D/B
- D/B-Bridging

GSA - Public Buildings Service 7.1.14.7.0.0
7.0.0.0.0.0 Construction
Design/Build-Bridging

7.1.14.2.0.0 Systems Start-Up and Testing (Commissioning)

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

7.1.14.2.0.0 Systems
Start-Up
and Testing
(Commissioning)

8.0.0.0.0.0 Tenant
Occupancy

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

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

Schedule start-up and testing

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

Identify special testing equipment

Develop format for start-up and testing

Perform start-up and testing

Develop punch lists and send to contractor

Contractor takes corrective action

Substantial Completion Certification 7.1.15.0.0.0.a

Pass?

CMa SOW – 6.3.1.0.0.0.a

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

Use O&M Manuals

LINKS

Cx Plan

PMP Reference

Quality Control Plan 7.1.2.0.1.2

Submittal Schedule/Log/Submissions 7.1.6.4.0.0

Inspections and Testing Schedule 7.1.6.5.0.0

Special Testing/Mock-up Plans/Reports 7.1.6.6.0.0

Turnover Documents 7.1.14.0.0.0

Substantial Competition Certificate: Final Completion 7.1.15.0.0.0.c

Occupancy Permit 7.1.16.0.0.0

This page applies to:

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

**7.0.0.0.0 Construction**

*Design/Build-Bridging*

**7.1.14.5.0.0 Property Management Training**
7.0.0.0.0.0 Construction
Design/Build-Bridging

7.15.0.0.0.a Substantial Completion Certification

Contractor Requests
Substantial Completion Certification

Substantial Completion Certificate: Final Cleaning
7.15.0.0.0.b

Receive Occupancy Permits
7.16.0.0.0

Final Inspections Completed and Accepted
7.14.0.0.a

Punch List
7.14.0.0.b

Substantial Completion Certificate: Final Completion
7.15.0.0.0.c

Verify Testing is Completed
7.14.2.0.0

Turnover Documents Received
7.14.0.0.0

Final OA
8.1.5.0.0

Tenant Move-in
8.2.6.0.0.0

Final Cx Report Received

Contractor makes Corrections

Are all Items complete and accepted by CO?

CO Issues Substantial Completion Letter to Contractor

Make sure retention is held for final completion

Inform central office of substantial completion

Update PIP for substantial completion

LINKS

O&M Manual Submittals
7.14.3.0.0

This page applies to:

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

GSA - Public Buildings Service

7.15.0.0.0.a

Construction Page 47
7.0.0.0.0 Construction
Design/Build-Bridging

7.1.15.0.0.0.b Substantial Completion Certificate: Final Cleaning

- Punch Lists
  7.1.14.1.0.0.b

- Establish schedule for final cleaning

- Clean according to cleaning specifications in contract

- Pass?
  Yes → Closeout (Admin)
  7.2.0.0.0.0

- No
  Make sure retention is held for final cleaning
Project Team coordinates/directs tasks for occupancy permits required

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

Receive elevator permits

Other environmental parties

Determine security testing responsibilities and request final testing

GSA Passes?

Yes

Building occupancy

Food Service will require outside permits

No

Make Corrections

Return to pass/fail

Yes

F/USMS Passes?
CMa/CxA performs the following duties as directed by the Project Team (PMP) 7.1.1.0.0.0.b

1. Initiate Punch List 7.1.14.1.0.0.b
2. Identify who will conduct final inspection and include tenant
3. Schedule final inspection
4. Develop format for final inspection
5. Perform final inspection

- **Inspection Passed?**
  - Yes → Start closeout process
  - No → Develop lists and send to contractor
7.0.0.0.0 Construction
Design/Build-Bridging

7.14.1.0.0.b Punch Lists

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

Schedule inspections

Project Team identifies
who will conduct
inspections

Develop format for
punch lists inspections

Perform inspections

Develop lists and
send to contractor

Contractor takes
corrective action

Reinspect

Develop final
punch list

Resolve disputed items

Completed Punch
List Tasks

Alternate source corrects

Award to alternate source

Deobligate from
construction contract

Negotiate cost

Identify source to do
work

Develop estimate of
cost

Yes

Contractor corrects

Other forces correct?

No

This page applies to:

✓ Traditional ✓ D/B ✓ D/B-Bridging ✓ CMc
7.15.0.0.0.c Substantial Completion Certificate: Final Completion

Contractor completes all tasks

Receive turnover documents

Complete and accept final inspections

Receive occupancy permits

Receive and complete substantial completion certification

Complete final cleaning

Pass? Yes

Issue Substantial Completion Certificate 7.15.0.0.0.a

No

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.

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc
7.0.0.0.0.0 Construction
Design/Build-Bridging
8.3.4.0.1.2 Maintenance and Cleaning Contracts
(GC/CC Option)

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

Will government utilize option or procure new contract?

Yes

No

Refer to PM criteria
Conservators of art
Special requirements (e.g., environmental)

CO executes Maintenance and Cleaning Option

Project Team defines scope of maintenance and cleaning

Coordinate with Property Manager on pending turnover date

Property Manager procures and places award

Project Team coordinates maintenance and cleaning schedule

Phase out GC/phase in maintenance contract

Cleaning contractor obtains security clearance for maintenance contract personnel

Perform regularly scheduled maintenance and cleaning IAW contract

LINKS

PMP Reference
O&M Manuals 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
7.0.0.0.0 Construction
Design/Build-Bridging

7.2.1.0.0.0 A/E Record Documents

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

CMA verify redlines are up to date

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

Receive as-built documents from GC/CC

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

Ensure PBS CAD standards are enforced 7.2.2.0.0.0

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

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

Cx Plan establishes quality control for verification of as-builds

QAQC should also address A/E Record Documents

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

GSA - Public Buildings Service 7.2.1.0.0.0 Construction Page 55
7.0.0.0.0 Construction
Design/Build-Bridging

7.2.2.0.0 Updated PBS CAD Library Submission

---

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc
Project Team contacts Customer Service/Marketing to advise of project completion

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

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

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc
7.2.5.0.0.0 Project Awards (LEED, EnergyStar, AiA, PM, etc.)

This page applies to:

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

7.2.3.1.0.0 Contract Closeout (GC/CC)

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
7.2.3.1.0.0 Contract Closeout (GC/CC)
8.0.0.0.0.0 Tenant Occupancy

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

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

All claims resolved/release of claims received?

- Yes: CO receives final invoice and Release of Claims (GSA Form 1142)
- No:
  - Identify scope of claim
  - Determine resolution process (negotiation, ADR, GSBCA, court of claims)

LINKS

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

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

GSA - Public Buildings Service 7.2.3.1.0.0
7.2.3.2.1.0 Project Management Closeout

- Project Team verifies Substantial Completion Certificate: Final Cleaning
- Project Team completes following tasks for PM closeout
- Develop lessons learned
- Complete NIH evaluations of A/E, CMa, CxA and CC
- Closeout A/E, CMa, CxA and other consultant contracts
- Store project files; stored regionally for 2 years; archived for 7 years; disposed of accordingly
- Perform final benchmark analysis (TI and Shell)
- Breakout final A/E and CM fees into categories of the professional services estimating tool

Some of these processes/tasks are concurrent

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

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

GSA - Public Buildings Service 7.2.3.2.1.0
Closeout (Admin) 7.2.0.0.0

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

7.0.0.0.0.0 Construction
Design/Build-Bridging
7.2.3.2.0.0 Financial Closeout

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

Project Team completes tasks for financial closeout

Close out RWAs if open
Return balance of funds to appropriate parties

Is interest due?

No

Retain for possible interest payments from final invoice

Yes

Pay interest

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)

Concurrent

Real Property Acquisition Advice (GSA Form 1011) 8.1.3.0.1.0

This page applies to:

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

LINKS

RWA
8.1.3.0.1.0 Real Property Acquisition Advice
(GSA Form 1011)

Project Team compiles project cost data

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

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

PBS Budget system commences depreciation
8.0.0.0.0 Tenant Occupancy
Design/Build-Bridging

8.1.0.0.0 Occupancy Agreements and RENT (Overview)

Begin preparation of OA

New or revised tenant space

Verify agency requirements

Initial Draft OA based on FS estimates 8.1.1.2.2.0.a

Update Draft OA based on PDS 8.1.1.3.0.0

Updated Draft OA based on Concept Design

Update Draft OA during DD 8.1.1.3.1.0

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

Update Draft OA prior to construction award 8.1.1.2.2.0.b

Final Reconcile OA 8.1.1.5.0.0

Archive as-built CAD Drawings 8.1.2.0.0.0

Initial RENT Start 8.1.3.0.0.0

Final OA 8.1.1.5.0.1

Substantial Completion Certificate 7.1.15.0.0.0.a

Limited Scope

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

No OA required

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

Extent/type of project?

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

GSA - Public Buildings Service 8.1.0.0.0.0 Tenant Occupancy Page 2
8.0.0.0.0 Tenant Occupancy
Design/Build-Bridging
8.1.1.2.0.a Occupancy Agreement Planning Phase
(Initial Draft)

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

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**LINKS**

- PBS Pricing Desk Guide
- Pricing Implementation for Project Management

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

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

- (0% to 100% Construction) 7.1.0.0.0.0

---

**This page applies to:**

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

---

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

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

This page applies to:

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

8.0.0.0.0.0 Tenant Occupancy
Design/Build-Bridging

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

GSA - Public Buildings Service

Tenant Occupancy Page 4
8.0.0.0.0 Tenant Occupancy
Design/Build-Bridging

8.1.1.4.0.0 Concept Design

8.1.1.4.1.0 Design Development

8.1.1.4.2.0 Mid-Point Construction Documents

8.1.1.4.3.0 100% Construction Documents

1. Develop cost/revise estimates based upon prospectus scope
   - Determine revisions to requirements
2. Conduct analysis to determine if budget is sufficient to cover cost estimate
   - Review requirements used to develop cost estimates
   - Transmit to agency for review
   - Revise draft OA
3. Is budget sufficient to cover cost estimate?
   - Yes: Revise design to get within budget
   - No: Review with agency
4. Is agency asking for increased scope?
   - Yes: Obtain the RWA
   - No: Review with agency
5. Has the TI estimate changed?
   - Yes: Review with agency
   - No: Continue with construction

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

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**LINKS**

- PBS Pricing Desk Guide
- Pricing Implementation for Project Management
- Feasibility
  - 2.4.1.0.0.a
- PDS
  - 2.5.0.0.0.0
- Design Development (Overview)
  - 6.8.0.0.0.0
- Construction Documents
  - 6.9.0.0.0.0
- Construction Procurement
  - 6.10.0.0.0.0
- (0% to 100% Construction)
  - 7.1.0.0.0.0

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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?
    - Yes: Revise OA using proposal costs
    - No: Award contract
  - No: Stop procurement and reevaluate, i.e., obtain an RWA, negotiate with the contractor or redesign, etc.

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

- Yes: Signed OA
- No: Redesign or cancel project

Does agency agree?

- Yes: Transmit to agency for review
- No: Redesign or cancel project

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

This page applies to:

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

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8.1.1.2.0.0 Tenant Occupancy
Design/Build-Bridging

8.1.1.2.0.0 Occupancy Agreement (Accepted Draft): Before Construction Award

8.0.0.0.0.0 Tenant Occupancy
Occupancy
8.1.1.2.0.0 Occupancy Agreement (Accepted Draft): Before Construction Award

8.0.0.0.0.0 Tenants Occupancy

Tenant Occupancy Page 6
8.0.0.0.0 Tenant Occupancy
Design/Build-Bridging

8.1.3.1.0 Occupancy Agreement (Accepted Draft): During Construction

1.0.0.0.0 Project Management Documents
2.0.0.0.0 Planning
3.0.0.0.0 Authorization/Funding
4.0.0.0.0 Site Acquisition
5.0.0.0.0 Design/Build
6.0.0.0.0 Design
7.0.0.0.0 Construction
8.0.0.0.0 Tenant Occupancy
8.1.3.1.0 Occupancy Agreement (Accepted Draft): During Construction

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

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

Is additional funding required?

- Yes
  - Revise OA
  - Transmit to agency for review

- No
  - Proceed with construction

Does agency agree?

- Yes
  - Obtain signature
  - 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.

- No

LINKS

- PBS Pricing Desk Guide
- Pricing Implementation for Project Management
- Feasibility 2.4.1.0.0.0.a
- PDS 2.5.0.0.0.0
- Concept Design (Overview) 6.7.0.0.0.0
- Design Development (Overview) 6.8.0.0.0.0
- Construction Documents 6.9.0.0.0.0
- (0% to 100% Construction) 7.1.0.0.0.0
- Construction Administration 7.1.6.0.0.0.a

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

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Tenant Occupancy Page 7
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
8.1.1.5.0.1 Final Occupancy Agreement

- Review draft OA and construction costs
- Apply all appropriate costs to space by ABC
- Calculate RENT by ABC
- Develop final OA
- Transmit to agency for review
- Does agency agree?
- Charge RENT and mediate with agency on outstanding costs
- Are there any changes from last signed OA?
- Signed OA
- Asset Manager completes Real Property Acquisition Advice (GSA Form 1011)
  8.1.3.0.1.0
- Initial Start RENT 8.1.3.0.0.0

Links:
- GSA Form 1011
- PBS Pricing Desk Guide
- Pricing Implementation for Project Management
  Feasibility 2.4.1.0.0.0.a
- PDS 2.5.0.0.0.0
- Concept Design (Overview) 6.7.0.0.0.0
- Design Development (Overview) 8.8.0.0.0.0
- Construction Documents 6.9.0.0.0.0
- GC/CC Source Selection Plan 6.10.1.0.0.0
- (0% to 100% Construction) 7.1.0.0.0.0
- OAs and RENT (Overview) 8.1.0.0.0.0

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMC
Use National CAD/CIFM Standards to finalize space assignment by ABC

8.1.2.0.0.0

Finalize project costs

Calculate RENT by ABC

Develop final OA (reconciliation)

Transmit to agency for review

Does Agency agree?

Yes

Signed OA

Finalize OA in STAR

Action Required

No

Are there any changes from final OA?

LINKS

PBS Pricing Desk Guide

Pricing Implementation for Project Management

Feasibility 2.4.1.0.0.0.a

PDS 2.5.0.0.0.0

Concept Design (Overview) 6.7.0.0.0.0

Design Development (Overview) 6.8.0.0.0.0

Construction Documents 6.9.0.0.0.0

GC/CC Source Selection Plan 6.10.1.0.0.0

(0% to 100% Construction) 7.1.0.0.0.0

OAs and RENT (Overview) 8.1.0.0.0.0

This page applies to:

☑ Traditional ☑ D/B ☑ D/B-Bridging ☑ CMC
8.0.0.0.0 Tenant Occupancy
Design/Build-Bridging

8.1.2.0.0 National CAD/CIFM Standards

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

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

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

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

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

GSA - Public Buildings Service 8.1.2.0.0.0 Tenant Occupancy Page 10
8.0.0.0.0 Tenant Occupancy
Design/Build-Bridging
8.1.3.0.0.0 Initial RENT Start

Project Team receives/ prepares documents for processing RENT billing

Substantial Completion Certification 7.1.15.0.0.0.a

Enter Shell, TI, operating and security costs into STAR

Amortize appropriate capital costs

Estimate building OT usage bills

Send notification to agencies

Initiate RENT billing

Inform central office of initial RENT start

Update PIP for performance measure

Final OAs 8.1.1.5.0.1

Real Property Acquisition Advice (GSA Form 1011) 8.1.3.0.1.0

Tenant Move-In 8.2.6.0.0.0

This page applies to:

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

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

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc
Determine age of telecommunications system and need for repair/replacement

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

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

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

Does tenant need new telecommunications system?

PDS Design Programming 2.5.0.0.0

Cost Estimates from FS 2.4.1.0.0.0.b

Telecommunications Installation - R&A

8.0.0.0.0.0 Tenant Occupancy

GSA - Public Buildings Service

This page applies to:

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

8.2.2.0.0.0.a

Tenant Occupancy Page 14
8.0.0.0.0 Tenant Occupancy

Design/Build-Bridging

8.2.0.0.0.b Telecommunications Installation - New Construction

**Flowchart Description:**

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

- **Will agency use in-house sources or FTS?**
  - **In-house**
    - Agency coordinates telecommunications system design A/E
  - **Agency procures, installs, and inspects telecommunications system installation**

- **Will tenant use in-house sources for inventory and design or A/E?**
  - **A/E**
    - Provide A/E estimate for inventory and telecommunications system design
    - A/E inventories telecommunications system and provides telecommunications system layout in the design
    - Obtain RWA from agency for telecommunications system inventory and design
    - FTS procures, installs, and inspects telecommunications system installation

**Links:**

- Fixtures, and Equipment (FFE)/Move-In (Overview) 8.2.0.0.0.0
- Agency IT Data Systems 8.2.3.0.0.0

**This page applies to:**

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

GSA - Public Buildings Service

Tenant Occupancy Page 15
**8.0.0.0.0 Tenant Occupancy**

**Design/Build-Bridging**

**8.2.3.0.0.0 Agency IT/Data Systems**

1. **Project Management Documents**
2. **Planning**
3. **Authorization/Funding**
4. **Site Acquisition**
5. **Design/Build**
6. **Design**
7. **Construction**
8. **Tenant Occupancy**

**8.2.3.0.0.0 Agency IT/Data Systems**

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**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

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**Tenant provides requirements for cabling and infrastructure**

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

**Integrate into CPM schedule**

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

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**Links**

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

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

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**GSA - Public Buildings Service**

**Tenant Occupancy Page 16**
1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
3.0.0.0.0.0 Authorization/Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design/Build
6.0.0.0.0.0 Design
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy
8.2.4.0.0.0 Security Systems Installation

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**8.0.0.0.0.0 Tenant Occupancy**  
**Design/Build-Bridging**  
**8.2.4.0.0.0 Security Systems Installation**

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**Links**

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

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**This page applies to:**

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

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**GA - Public Buildings Service**

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**Tenant Occupancy** 8.0.0.0.0.0
8.0.0.0.0 Tenant Occupancy
Design/Build-Bridging

8.2.5.0.0.0 USMS A/V and Security Systems Installation

Project Team commences major security discussions with USMS during DDs

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

A/E provides design IAW 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

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

Contact USMS

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

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