PM Guide

Traditional
Design/Build (D/B)
Design/Build-Bridging (D/B-B)

Construction Manager as Constructor (CMc)

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

Construction Manager as Constructor

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

Pre-Project (Preliminary) Planning

Site Acquisition

Environmenal/NEPA Compliance

Feasibility

PDS

Relocation Planning

Project Coordination exists at every level
Planning 2.0.0.0.0

Construction Manager as Constructor

2.1.0.0.0.0 Pre-Project Planning (Overview)

Is it a capital project?

Yes

Commence FS 2.4.1.0.0.0.a

Select the best alternative

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

Traditional or CMc

Design/Build Bridging

Design/Build

Lease Construction

Site and Design Prospectus Submission

Site and Design Authorization

PDS 2.5.0.0.0.0

Construction Prospectus Submission

Construction Authorization 3.4.0.0.0.0

Submit Site Prospectus

Design/Build PDS 2.5.0.0.0.0

Design/Build Prospectus Submission

Design/Build Authorization

To be developed in Phase II

ABT prioritizes in small projects process (BA54)

This page applies to:

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

Overview of Capital Investment and Leasing Program (CILP) process

Project Coordination 1.1.0.0.0.0.a

Project Coordination exists at every level

GSA - Public Buildings Service 2.1.0.0.0.0 Planning Page 2
2.0.0.0.0 Planning

Construction Manager as Constructor

2.1.0.0.0.1 Pre-Project (Preliminary) Planning

- Identify need/driver
- Can request be met in existing space?
  - Yes: Perform informal site selection tasks in support of NEPA, NHPA, and due diligence
  - No: Initiate FS
- Is it below prospectus?
  - Yes: Prepare Initial Draft OAs
  - No: Prepare Draft PMP
- Submit PMP: Assemble Project Team
- Meet request in BA54 Program Small Projects Process
- Submit construction prospectus
- Prepare PDS
- Conduct programming and review benchmarks (OCA-GCCRG)
- Review programming and cost estimates
- Is it new construction?
  - Yes: Review funding
  - No, R&A: Prepare Initial Draft OAs
  - No: R&A

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

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

Construction Manager as Constructor

1.1.0.0.0.0.a Project Coordination

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

Pre-Project (Preliminary) Planning 2.1.0.0.0.1

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-Bridge
- CMc

GSA - Public Buildings Service 1.1.0.0.0.0.a Planning Page 4
1.0.0.0.0 Project Management Documents

Construction Manager as Constructor

1.1.0.0.0.a PMP: Assemble Project Team

Asset Manager assembles Project Team

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

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

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

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

Feasibility 2.4.1.0.0.0.a
PDS 2.5.0.0.0.0
Site Acquisition 4.0.0.0.0.0.a

This page applies to:

Traditional  D/B  D/B-Bridging  CMC
Existing condition assessments are required to develop scope and costs for R&A alternatives.

Project Team reviews existing information

Is additional information needed?

Yes

No

Obtain additional information

Incorporate assessments into FS or PDS if D/B

This page applies to:

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

Local Portfolio Plans

Campus/Facility Master Plans

Building Engineering Report

Accessibility Survey

Fire/Life Safety Study

Hazardous Materials Survey

Highest and Best Use Appraisal (R&A)

Safety/Security Study (ies)

Energy Conservation Audit

Historic Preservation Plan and Cultural Resource Study

Use Project Consultant Task Order

Include in FS

Include in PDS if D/B

Feasibility

2.4.1.0.0.0.a

Planning Page 6
LPPs are utilized by ABT to understand the overall inventory (leased and owned) and to determine if space requests may be satisfied in the existing inventory. If not, the ABT may choose to initiate a FS. LPPs are typically prepared in-house by the Asset Manager.

Will the agency request be satisfied within existing inventory?

Is it a capital project?

Yes

No

ABT will prioritize in small projects process (BA54)

Project Team reviews appropriate LPP

Yes

No

Project Team will study viable alternatives in FS 2.4.1.0.0.0.a

Or

PDS if D/B 2.5.0.0.0.0

Feasibility 2.4.1.0.0.0.a

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc
2.0.0.0.0 Planning
Construction Manager as Constructor
2.1.1.0.0.0 Campus/Facility Master Plans

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 reviews current Master Plan

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
**2.0.0.0.0 Planning**

**Construction Manager as Constructor**

**2.1.3.0.0 Building Engineering Report**

- **Project Team** reviews existing BER

- **Is it necessary to proceed to next level?**
  - **Yes**: Complete Level 4 BER to support capital project submission
  - **No**: Project Team reviews open work item inventory in IRIS

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

- **Use Project Consultant Task Order** 6.1.1.0.0.0.a

- **Include in FS Scope** 2.4.1.0.0.0.a

- **Include in PDS if D/B** 2.5.0.0.0.0

**Use Project Consultant Task Order**

- **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.**

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

**This page applies to:**

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

**Existing Conditions Assessments** 2.1.12.0.2.0
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.

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

Is additional information needed?

- Yes: Obtain additional studies
  - Use Project Consultant Task Order
  - Include in FS Scope
  - Include in PDS if D/B
- No: Incorporate accessibility work items into project scope

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc
Project Team consults with Regional Fire Protection Engineer to determine existing information.

Fire/Life Safety Studies are used primarily in R&A projects to gain an understanding of fire, life safety deficiencies, and any associated costs to be included in the R&A alternative.

Is additional information needed?

Yes

- Obtain additional studies

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

No

Incorporate Fire/Life Safety work items into project scope

This page applies to:

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

GSA - Public Buildings Service 2.1.3.1.0.0 Planning Page 11
Hazardous Material Surveys are used to track and account for the presence of hazardous substances and to identify remediation, if required. In R&A projects, surveys identify the hazardous materials present and the associated costs for remediation. Surveys are also used in field office O&M plans.

**Is additional information needed?**

- **Yes**
  - Obtain additional information
  - Incorporate Hazardous Materials Survey information into building O&M plan and/or work items for project scope

- **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

---

**This page applies to:**

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

---

**2.0.0.0.0 Planning**

**Construction Manager as Constructor**

**2.1.5.0.0.0 Hazardous Materials Survey**
2.0.0.0.0 Planning
Construction Manager as Constructor

2.1.6.0.0.0 Highest and Best Use Appraisal (R&A)

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

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

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

Project Team reviews current ABP
Consult with FPS/DHS and Building Security Committee to determine applicability of a security charrette

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

Conduct preliminary threat and risk analysis

Conduct protection level assessment/ISC Survey

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

Incorporate security recommendations into project scope and budget

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

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

Construction Manager as Constructor

2.1.9.0.0.0 Energy Conservation Audit

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

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?

Is there an existing building energy audit?

Yes

No

Develop energy usage targets for new construction with central office.

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

Yes

No

Conduct energy audit.

Use Project Consultant Task Order 6.1.0.0.0.0.a

Include in FS Scope 2.4.1.0.0.0.a

Include in PDS if D/B 2.5.0.0.0.0

GSA - Public Buildings Service

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

Existing Conditions Assessments 2.1.12.0.2.0

2.1.9.0.0.0 Energy Conservation Audit

Energy Center of Expertise

HVAC Excellence and Specification

PBS-P100

LINKS
2.0.0.0.0 Planning

Construction Manager as Constructor

2.4.1.0.0.0.a Feasibility

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

Project Team prepares SOW for FS

Asset Manager provides client housing information

Award appropriate work to contractors

Compile available technical studies

Feasibility: R&A

Feasibility: New

Feasibility: Lease

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

Additional technical studies required?

No

Yes

Define building security amortized capital costs

Identify alternatives and implementation strategies

Develop cost estimates by Shell and TI

Identify agency-specific allowances (e.g., USMS)

Asset Manager performs inventory analysis and financial analysis

Conduct risk assessment for project alternatives

Identify preferred alternative

Identify project delivery method and A/E selection process

Complete FS

Coordinate NEPA Phase I and NHPA studies/consultations as needed to evaluate viable options and site information

Obtain necessary studies by contract

Complete PDS if D/B

LINKS

DEP&P GSA Guidebook I – Acquisition of Real Property

GSA Guidebook II – Relocation of Residents and Businesses

NEPA NHPA PBS Pricing Desk Guide

Pre-Project Planning Guide Preservation Desk Guide Pricing Implementation for Project Management

PMP 1.1.1.0.0.0.b Pre-Project (Preliminary) Planning 2.1.0.0.0.1 NHPA 2.2.0.0.0.0

OAs and RENT (Overview) 3.1.0.0.0.0

This page applies to:

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

Feasibility 2.4.1.0.0.0.a

PDS 2.5.0.0.0.0
Complete FS

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

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

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

LINKS

- 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
- 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

GSA - Public Buildings Service

2.4.1.0.0.0.b

Planning Page 17
The PPT contains WBS and detailed project tasks for Cx and quality assurance plans.

The CMa and Cx services required during each stage of the project IAW current guidelines.

Programmatic discussion may be found in the Building Cx Guide.

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

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

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

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

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

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

Develop preliminary Cx Plan and required budget in FS.

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

The PPT contains WBS and detailed project tasks for Cx and quality assurance plans.

The 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.

The CMa and Cx services required during each stage of the project IAW current guidelines.

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

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

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

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

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

Develop preliminary Cx Plan and required budget in FS.

Cx Plan will be updated for the PDS and as needed by the Project Team.
6.0.0.0.0 Design
Construction Manager as Constructor

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

IDIQ, FSS or stand-alone contract

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

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc
Review accessibility
Review fire safety
Review hazardous materials
Review reinvestment index
Review building systems needs

Project Team conducts study based on construction type

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

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

LINKS
GSA Guidebook I – Acquisition of Real Property
GSA Guidebook II – Relocation of Residents and Businesses
PBS-P100
WBDG
PMP 1.1.1.0.0.0.0.b

Existing Conditions Assessments 2.1.12.0.2.0
NHPA 2.2.0.0.0.0
NEPA 2.3.0.0.0.0

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

2.0.0.0.0.0 Planning
Construction Manager as Constructor
2.4.1.0.0.0.c Feasibility: R&A
2.4.1.0.0.d Feasibility: New Construction

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

New construction alternative has scope and budget data for analysis in Feasibility Phase

**LINKS**

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

**This page applies to:**

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

Construction Manager as Constructor

2.4.1.0.0.0.e Feasibility: Lease Construction

Project Team conducts study based on construction type

Confirm housing plan

Develop lease construction scope

Conduct market survey for cost data

Confirm leasing cost data with regional appraiser

Lease alternative has scope and budget data for analysis in Feasibility Phase

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

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc
2.0.0.0.0 Planning
Construction Manager as Constructor
4.0.0.0.0.b Site Investigation Tasks for FS

3.0.0.0.0 Authorization/Funding
4.0.0.0.0 Site Acquisition

4.0.0.0.0.b Site Investigation Tasks for FS

Project Team defines need for capital project

Is site ACQ required for capital project?

Yes: Project Team further defines site ACQ criteria

No further action required

No: Project Team develops SOW for FS

In PDS if D/B

Site Team orders special studies*

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

Include in PDS if D/B

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

Project Team further defines site ACQ criteria

Project Team formalizes Site Selection Team

Site Team initiates preliminary NHPA and NEPA tasks

Project Team evaluates preliminary site data in FS or PDS if D/B

Real estate market survey

Real estate market appraisals

DA justification

Municipality discussion documentation

Existing/Adjacent site soils report

Preliminary site development cost estimate

Fact Sheet on Executive Order 13006

Project Funding Request

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

GSA - Public Buildings Service

Planning Page 24
Project Team coordinates scope for FS to address site needs of the project for Due Diligence, NHPA, NEPA, et al. Refer to DEP&P and PBS-P100 for site considerations.

NHPA
RHPO coordinates with SHPO. RHPO briefs Project Team on progress of consultation(s) 2.2.0.0.0

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

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

Site Acquisition
Site Acquisition Specialist coordinates with RHPO and NEPA Coordinator as needed. Specialist manages technical studies, appraisals and relocation estimates and updates Project Team on costs and status 4.0.0.0.0.0.a

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

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

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

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

GSA - Public Buildings Service 4.0.0.0.0.c Planning Page 25
2.0.0.0.0 Planning
Construction Manager as Constructor

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

- Copy of MOA/PA to Advisory Council on Historic Preservation

- 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.

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

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

**Links**

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

Construction Manager as Constructor

2.3.0.0.0 NEPA Tasks for FS through Site Acquisition

Project Team assigns roles and responsibilities

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

Include in PDS if D/B

Initiate NEPA in FS

Phase I may commence at Region’s discretion

Is this a CATEX?

No

Regional NEPA Program Coordinator commences EA/EIS process

Gather data/hold public meeting

Publish document

Revise EA/EIS as needed

Is this a FONSI or ROD?

FONSI - NEPA completed

ROD

Incorporate NEPA mitigation into design documents

Monitor MOA/PAs and mitigation throughout project delivery

This is an ongoing rather than an ending process

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

NEPA
NHPP

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

Planning 2.0.0.0.0.0
Relocation Planning 2.6.0.0.0.0

This page applies to:
- Traditional
- CMc
- D/B
- D/B-Bridging
2.0.0.0.0 Planning
Construction Manager as Constructor

2.6.0.0.0 Relocation Planning

Is there site-related relocation or swing space?

Identify potential project sites and impacts from resident/business displacement

Review cost and schedule impacts for viable alternative sites

Incorporate relocation issues into site cost estimate for FS

Coordinate with RHPO and NEPA Coordinator as issues are identified

Complete FS and prepare Site and Design Prospectus

Review housing plan and tenant needs/requirements

Identify the phasing plan assessing unique tenant requirements

Review cost and schedule impacts of required phasing/swing space

Prepare required lease AQP

Incorporate phasing/swing costs into FS and project budget

Or

Compile site data and prepare Site Prospectus if D/B

Update FS estimates during PDS for Construction Prospectus submission

Planning Page 28

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

GSA Guidebook II – Relocation of Residents and Businesses
PBS Pricing Desk Guide

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

GSA - Public Buildings Service 2.6.0.0.0
Planning

Construction Manager as Constructor

1.1.2.0.0.0 Commissioning Authority (Cx) (Overview)

The PPT contains WBS and detailed project tasks for Cx

Project Team determines level of Commissioning (Cx) required during each phase of the project IAW with current guidelines

Programmatic discussion may be found in the Building Cx Guide

Planning

Project Team identifies lead on Cx task/team

Design

Include Cx services in A/E, CMa and/or CxA Scopes of Work as determined by Project Team

Construction

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

Post Construction

CMa or CxA performs deferred/seasonal testing, warranty inspections, and completes Final Cx Report

Develop preliminary Cx Plan and required budget in FS

Update Cx Plan as building systems are identified and designed

Conduct owner training and Turnover Cx Record

Perform Satisfaction Review with tenants and submit findings to Project Team

Cx integrated into FS and updated in PDS

Contract documents aligned with GSA/PBS’ Project Requirements

Systems performance documented and accepted

System performance sustained

This page applies to:

Traditional, D/B, D/B-Bridging, CmMc

Feasibility

2.4.1.0.0.0.a

PDS

2.5.0.0.0.0

CxA SOW (if apart from CMa)

6.3.1.0.0.0.b

CMa Task Order/CxA Task Order

6.3.2.0.0.0
1.0.0.0.0 Project Management Documents
Construction Manager as Constructor
1.1.0.0.0.b Project Management Plan (PMP)

**PM** coordinates PMP development with Project Team.

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

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

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

- **Incorporate HCAM/TMP**
- **For CMc define roles of A/E, CMc, and CM as agent for cost estimating, code reviews, M&I services, and constructability reviews**
- **PMP** establishes resources, schedule, and budget.

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

**Design 6.0.0.0.0.0**

- **Incorporate Cx**
- **Draft PMP submitted with Site and Design Prospectus**
- **PM** publishes PMP, updates as appropriate, and uses as communication tool for team and clients.

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

**LINKS**

- Acquisition Plan FAR Part 7
- Building Cx Guide
- PMP Examples
- PMP Template (PIP)
- Feasibility 2.4.1.0.0.0.a

**This page applies to:**

- Traditional
- D/B
- D/B-Bridging
- CMc
Project Team evaluates project needs and discusses project delivery methods.

Project Team selects delivery method.

Project Team discusses procurement strategies based on selected delivery method.

A/E  CxMa  CMC

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.

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

Links:
- Acquisition Plan
- Acquisition Plan FAR Part 7
- DEP&P
- PMP/Acquisition Plan Outline Combined
- Sample SSP
### RECAP – CAPITAL CONSTRUCTION PROCUREMENTS

Apply Source Selection Procurement Procedures

#### Project Delivery Methods Are Highlighted as Follows:

<table>
<thead>
<tr>
<th>A/E</th>
<th>General Contractor (GC) or Construction Contractor (CC)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>A/E Source Selection</strong></td>
<td><strong>General Contractor</strong></td>
</tr>
<tr>
<td>6.2.0.0.0.0</td>
<td>6.10.0.0.0.0</td>
</tr>
</tbody>
</table>

**Traditional**
- 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
- 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.

**CMc**
- Project Team will determine if SS will be Two-Stage, Two-Stage Plus Design Charrette or Three-Stage with a Design Competition
- GC will be on board during Concept development by A/E for maximum benefit to GSA
- Project Team must prepare a comprehensive RFPs to obtain the desired quality building with a good balance for schedule and budget.

**D/B**
- D/B hires A/E

**D/B-Bridging**
- Project Team will determine when to bring the D/B-B CC and their A/E on board to maximize bridging benefits from Design A/E to D/B A/E.
- Concept Design services of the A/E will be obtained by SSP. The level of DD will be determined by the Project Team based on the needs of the project.

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

**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**
REQUIRED PROFESSIONAL SERVICES FOR CAPITAL CONSTRUCTION PROJECTS:

**Construction Manager as Agent (CMa)**
- Concurrent with A/E selection 6.3.1.0.0.0.a
- Project Team determines SOW required from the CMa and the level of services required in each Phase: Design Concepts, DDs, CDs, Construction Administration, through Start-up and Turnover.

**Commissioning Agent (CxA)**
- Concurrent with A/E selection 6.3.1.0.0.0.b
- Project Team determines the level of Cx desired (considering timing of project and budget constraints). A complete Cx Plan is required for FY 2007 Design Starts.

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

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

- **AiA 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**
1.0.0.0.0.0 Project Management Documents

Construction Manager as Constructor (CMc)

1.1.1.0.0.0.f Procurement Recap

A/E
- Concepts
- Design Development
- Construction Documents
- Construction Services

CMc
- Construction Contractor
- Design Services
- Construction
- Start-up/Turnover

CxA
- 6.3.1.0.0.0.a

AIA
- 6.1.0.0.0.0.b

CMc
- Project Consultants (as needed)
  - Design
  - Construction
  - Start-up/Turnover
  - 6.1.0.0.0.0.a

This page applies to:

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

GSA - Public Buildings Service

Planning Page 34
1.0.0.0.0  Project Management Documents

Construction Manager as Constructor

1.1.3.1.0.0 Initiate Project in PIP

- Create project in database
- Utilize PMP template
- Take information from FS and enter as new project in PIP to coincide with CILP
- Portfolio coordinates the submission of project as part of the CILP via the PIP

Refer to annual CILP instructions

LINKS

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc
1.1.3.2.0.0 Project Updates in PIP

**Project Team** identifies who has editing authority

**Update at least monthly**

**Utilize PIP as a major communication tool for Project Team and management**

**PIP is used by all levels within GSA and outside customers to view project status**

**Updated PIP**

**LINKS**

Initiate Project in PIP 1.1.3.1.0.0

**This page applies to:**

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

GSA - Public Buildings Service 1.1.3.2.0.0 Planning Page 36
Project Coordination

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

1.1.0.0.0 Project Coordination
1.1.0.0.0.a Traditional CMc
1.1.0.0.0.b D/B
1.1.0.0.0.c D/B-Bridging
1.1.0.0.0.d CMc

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

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

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

GSA Document Security Requirements

DrCHECKS

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

NISPOM (Classified Documents)

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

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

Construction Manager as Constructor

6.1.1.0.1.0 Courthouse Orientation and Design Start Workshop

OCA issues site and design directive

Regions formally appoint PM (if not previously appointed)

PMs invited to workshops sponsored by the OCA

PM assembles Project Team (Transition is made from ABT)

Present PMP to OCA representatives and GSA peers (PMs)

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

PMs update PMP as needed

---

LINKS

Project Coordination 1.1.0.0.0.a

This page applies to:

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

GSA - Public Buildings Service
3.4.0.0.0 Construction Authorization (Prospectus)

Regions submit draft construction prospectus based on CILP requirements

Central Office reviews and prioritizes submissions

Central Office submits prospectus to OMB

Region obtains funding and awards construction contract

Region submits allowance request to Central Office

Central Office obtains funding

OCA hosts construction start workshop

Congress approves construction budget

This includes House and Senate authorization and appropriation

OMB includes construction prospectus in President’s budget

Project to be resubmitted in future FY

Not approved

OMB passback

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

GC/CC Procurement commences when contract drawings are complete.
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.
6.0.0.0.0 Design
Construction Manager as Constructor
4.2.0.0.0 Site Acquisition (Overview)

Site Acquisition (Overview)

Site Selection Team completes formal Site Selection Process

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

Are there site concerns?

Yes
Conduct ESA Phase 2 sampling
Complete NEPA and NHPA

Is this ROD or FONSI?

ROD
Develop costs to clean property
Incorporate mitigation into design documents
Acquire site

FONSI
NEPA complete

Review and approve final appraisal
Deduct cost to clean property
Determine final property valuation

No
ESA completed

Contract for appraisal
Review draft appraisal
Complete survey

Appraisal and GeoTech Studies

Are there site concerns?

Yes
No

Perform BTU survey
Complete survey

Contract for appraisal
Review draft appraisal
Complete survey

Construction Award cannot occur without clear title to site

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

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

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

Monitor MOA/PAs and mitigation throughout project delivery. This is an ongoing process rather than an ending process.
6.0.0.0.0 Design
Construction Manager as Constructor
6.2.0.0.0 A/E Procurement (Overview)

1.0.0.0.0 Project Management Documents
2.0.0.0.0 Planning
3.0.0.0.0 Authorization/Funding
4.0.0.0.0 Site Acquisition
5.0.0.0.0 Design/Build
6.0.0.0.0 Design
6.2.0.0.0 A/E Procurement (Overview)
7.0.0.0.0 Construction
8.0.0.0.0 Tenant Occupancy

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

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

**6.4.2.0.0.0 Source Selection Plan**

**Two-Stage Selection**

OCA issues Site/Design Directives

Project Team implements A/E SS Strategy approved in PMP

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

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 Office of Chief Architect Center for DE and the Arts.

One customer representative with both design and procurement expertise.

Two advisors

One from GSA.

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

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

**LINKS**

- Acquisition Plan
- DEP&P
- FAR
- GSAM
- PIP template for PMP
- PMP Examples
- Samples of Selection Plans
6.2.1.0.0.0.b Design Charrette (Optional)

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

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

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

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

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

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

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

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

Coordinate Planning with OCA and Competition Advisor and Hold Vision Competition

Blind Evaluation of Vision Competition by Independent Jury of National Peers

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

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

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

Final Selection by the GSA Regional Selection Authority
6.0.0.0.0.0 Design
Construction Manager as Constructor
6.2.2.0.0.0, 6.2.4.0.0.0, and 6.2.5.0.0.0 A/E Source Selection/Evaluation Process

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

6.2.0.0.0.0 A/E Procurement (Overview)
6.2.1.0.0.0.a
6.2.1.0.0.0.b Design Competition
6.2.1.0.0.0.c
6.2.2.0.0.0
6.2.3.0.0.0 Design Page 9
GSA - Public Buildings Service

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

---

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

**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/E firms**

**Receive Phase II submissions**

---

**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**

---

**Project Team receives approved SSP and commences A/E selection**

---

**Advertise for Design Architect – Bridging Design Services**

---

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

- **Yes**
  - Project Team conducts a Design Charrette 6.2.1.0.0.0.b
  - **Or**
    - Design Competition 6.2.1.0.0.0.c
    - **A/E Board makes final ranking and recommendations to the GSA selection authority**
      - **GSA selection authority makes final selection**
      - **Negotiations begin with the selected firm for the A/E contract**

- **No**
  - **Project Team conducts a Design Charrette 6.2.2.0.0.0.a**
**A/E Contract for Design**

1. GSA Project Team meets with A/E to review project goals and objectives.
2. GSA issues initial SOW to A/E.
3. Meet with A/E to review SOW.
4. Revise SOW.
5. Update government fee estimate.
6. Request proposal.
7. Receive and review proposal.
8. Prepare technical evaluation including PNP.
9. PM/CO conduct negotiation with A/E.
10. Prepare PNM.

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

- 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.

**Award A/E contract and compile contract file**

**Sample PNM**

**Sample PNP**

**A/E Procurement (Overview)**

**LINKS**

**This page applies to:**
- Traditional
- D/B
- D/B-Bridging
- CMc
6.0.0.0.0 Design
Construction Manager as Constructor
6.3.1.0.0.0.a CMa Scope of Work

Project Team develops CMa SOW

Confirm project goals and objectives

Prepare SOW

Review prospectus, FS, BER, etc.

Confirm construction budgets

Building Cx Guide

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

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

LINKS

CMAA Standards  DEP&P

HVAC Excellence  LEED  PBS-P100

Pricing Implementation for Project Management  SOW Examples
6.0.0.0.0 Design

Construction Manager as Constructor

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.

The Project Team confirms project goals and objectives with all stakeholders

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

Finalize SOW

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

- Project Team reviews PMP strategy and required Cx services

This page applies to:

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

GSA - Public Buildings Service

6.3.1.0.0.0.b Design Page 12
The Project Team evolves over the life of the project. As contractors (A/E, CMa, CMc, Cx, GC/CC) and special consultants are hired, they become a part of the Project Team.

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

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

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc
6.0.0.0.0.b Art-in-Architecture 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
- Acceptable?
- Composer approves artist selection
- RFAO writes draft SOW/contract clauses, establishes schedule, determines commission price
- Commissioner approves OCA and Program Manager
- Forward recommendation letter to OCA and Program Manager
- Write recommendation letter for RA signature
- Issue draft contract
- Discuss contract with artist and negotiate changes to deliverables; price is firm fixed
- Revise and issue final contract

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

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

Fine Arts Desk Guide

GSA - Public Buildings Service
7.0.0.0.0 Construction
Construction Manager as Constructor
7.0.0.0.0 Construction

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

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

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

**Construction Manager as Constructor**

**6.10.1.0.0 GC/CC Source Selection Plan**

---

**1.0.0.0.0 Project Management Documents**

**2.0.0.0.0 Planning**

**3.0.0.0.0 Authorization/Funding**

**4.0.0.0.0 Site Acquisition**

**5.0.0.0.0 Design/Build**

**6.0.0.0.0 Design**

**7.0.0.0.0 Construction**

---

**6.10.1.0.0 GC/CC Source Selection Plan**

- Project Team reviews AQP and PMP
- Prepares/updates AQP as needed
- Establish SSEB
- Recommendations: GSA and customer as voting members. A/E and CM as technical advisors.
- Develop SSP Criteria
- SSEB reviews and SSA approves SSP
- Is it approved?
  - Yes
  - Issue SSP
  - No
  - Review with legal counsel if necessary
  - Revise and resubmit
  - Draft SSP

---

**Links**

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

---

**This page applies to:**

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

---

**GSA - Public Buildings Service**

6.10.1.0.0

Design Page 17
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 6.10.4.0.0.0
**Construction Manager as Constructor**

**6.10.4.0.0 Pre-Proposal Conference**

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

**CO** sets up SBA networking processes

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

**PM/CO** develops agenda

**PM/CO** conducts meeting and tour

**CMa** provides minutes/sign-in sheet to all attendees

**Is another pre-proposal conference necessary?**

- **Yes**
  - **CMa** provides minutes/sign-in sheet to all attendees
  - **Proceed with Proposal Document Addenda**

- **No**
  - **Proceed with Proposal Document Addenda**

**LINKS**

- FAR
- GSAM
- Sample Agenda
- GC/CC Source Selection Plan

**This page applies to:**

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

SSEB independently evaluates Phase II proposals

Develop a competitive range

Interview those in the competitive range

SSEB determines final consensus scores and ranking

SSEB Chairman drafts final report and issues to SSA for approval

Are price proposals within available funds?

No

Develop negotiation strategy

Implement strategy

Offerors within the competitive range submit BAFO

Yes

Notify offerors

Update OA prior to award 8.1.1.3.0.0
Project Team requests allowance from OCA/PBS Budget Office

Update OA 8.1.1.3.0.0

CO issues award and publishes award announcement

Request bonds and insurance

Receive, review, and approve

Initiate security clearance process of contractor personnel

If CMc, the NTP will be issued to CC for design services (GMP option to be exercised at a later date)

CO issues NTP 7.1.1.0.0.0

The CDs can be conformed with all amendments as deemed appropriate.

If Traditional or CMc, with GC/CC 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.
6.0.0.0.0.0 Design

Construction Manager as Constructor

6.7.0.0.1.b Concept Design (Continued)

A/E incorporates VE, develops final presentation

Validate funding sources

Conduct regional presentation

Concept Design Review Comments 6.7.6.3.0.0

Verify budget compliance by performing IGE

Prepare final concept submission

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

Submit for OCA IGE

OA Update 8.1.1.3.0.0

The OCA review is concurrent with the final concept review

Review final concept submission

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.

A/E incorporates review comments

Conduct presentation to Commissioner 6.7.14.0.0.0

OCA prepares Commissioner’s final concept approval memorandum

Issue NTP for DD phase

6.7.0.0.0.1.a Concept Design

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

6.7.0.0.1.b Concept Design (Continued)

Construction
Tenant Occupancy

6.7.2.0.0.0 Use Agency Design Guides

LINKS

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

A/E Services SOW (Overview) 6.2.1.0.0.0.a

This page applies to:

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

GSA - Public Buildings Service 6.7.0.0.1.b Design Page 26
Partnering workshop is an opportunity to introduce all stakeholders and the project team, establish a partnering statement and charter. Each party has an opportunity to state their goals for the project.

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

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

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

Establish lines of communication and roles and responsibilities.
Design Charrette Documents

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.

1.1.1.0.0.b

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

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

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

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

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

At least three distinctly different concepts will be submitted by the A/E team.
6.7.6.3.0.0 Concept Design Review Comments Including Concept Design Selection and 6.7.9.0.0.0 VE Workshop

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

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

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

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

Construction Manager as Constructor

6.7.14.0.0.0 Final Concept Presentation to the Commissioner

6.7.15.0.0.0 Final Concept Approval Memorandum

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

Preferred: include the presentation of the AIA

6.7.14.0.1.0

A/E and PM conduct presentation

OCA issues Task Order for IGE

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

OCA will review and comment within 10 working days

Reconciliation of IGE and A/E estimate

Is project within budget?

No

Redesign to budget

Yes

Schedule presentation to Commissioner

Coordinate meeting logistics

A/E and PM conduct presentation

OCA prepares Commissioner final concept approval memorandum

Issue NTP for DD phase

Have the team review the layout of the presentation room to coordinate the presentation with the room’s physical constraints. Work out logistics for project model and audio-visual delivery. Verify the list of attendees with OCA. Include all important stakeholders.

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

6.15.0.0.0.0 Final Concept Approval Memorandum

LINKS

PBS-P100 Concept Design Partnering Workshop 6.7.2.0.0.0

This page applies to:

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

GSA - Public Buildings Service

6.7.14.0.0.0

Design Page 32
Artist initial meeting
Meet panel to discuss goals and objectives, including design team to review options
Artist prepares concept design(s)
Conduct internal GSA review, as necessary
Present final concept to art panel
Art panel approves concept?
Yes
RA recommends approval of concept to OCA and Commissioner
No
Peer review may occur in this step
Art concept may be incorporated into the A/E's final concept design presentation to Commissioner

LINKS

Concept Design
Partnering Workshop
6.7.2.0.0.0

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc
6.0.0.0.0 Design
Construction Manager as Constructor
6.8.0.0.0.0 Design Development (Overview)
6.8.0.0.0.1 Design Development (Process)

**Design Development (Process) Overview**

- **Prepare/ Distribute Interim DD Submission(s)**
- **Conduct interim submission(s) review**
- **Is another interim submission required?**
  - Yes: **Conduct OCA Review**
  - No: **Prepare final DD submission**

**Key Steps**

1. **Prepare/ Distribute Interim DD Submission(s)**
   - Verify budget compliance by performing IGE
   - Conduct National CAD/ CIFM Standards Completeness Review
   - Systems Selection and LCC Analyses
   - Owner's/Code/ Constructability Staff Reviews
   - Conduct IGE as necessary for the submission, verify budget compliance

2. **Conduct interim submission(s) review**
   - Conduct DD VE Workshop
   - Evaluate and Incorporate VE Recommendations
   - Independent OCA PBS-P100 Review and Estimate
   - Review TI Status with customer
   - OA Update

3. **Is another interim submission required?**
   - Yes: **Conduct OCA Review**
   - No: **Prepare final DD submission**

**Other Key Activities**

- Review Tenant Telecommunication Requirements
- Update PDRI
- Conduct DD VE Workshop
- Evaluate and Incorporate VE Recommendations
- Independent OCA PBS-P100 Review and Estimate
- Conduct TI Status Workshop
- OA Update
- NTP to CD phase

**Links**

- National CAD/ CIFM Standards
- OA Tool
- PBS-P100
- PDRI
- Concept Design (Overview)
- OA Tool
- PBS-P100
- PDRI
- Concept Design (Overview)

**This page applies to:**

- Traditional
- D/B
- D/B-Bridging
- CMc
Query PMs from recently completed projects and determine if and how they were able to participate in local Utility Rebate Programs. Task the A/E to research your specific locality. Locality issues may be highly influential in GSA’s ability to participate. Based on the data compiled, the Project Team will be better positioned to make informed business decisions early in DD.
Project Team should review PMP, Cx Plan and status of current programming. PMP strategy may indicate a need for the DD Workshop if certain program parameters are evident.

Is a workshop needed?

Yes

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

No

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

Verify scope and budget are within the approved prospectus

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

Construction Manager as Constructor

6.8.2.0.0 DD Systems Selection Analyses

A/E defines and sizes base systems and alternatives

A/E performs life cycle cost analysis

DD Submission for Project Team review

Project Team makes system selections

Structural, mechanical, electrical, plumbing, etc.

Must be aligned with LEED goals

OCA HVAC peer review

This page applies to:

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

Links:
- HVAC Excellence
- PBS-P100
- PMP Reference
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.
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
The DD Submission (35%) will be forwarded to OCA for an independent PBS-P100 Review. The OCA IGE is optional at this time.

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

OCA will review and comment within 10 working days

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

Final approvals will be issued by the PM/CO

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

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

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

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

6.8.11.0.0.0 Independent OCA PBS-P100 Review and IGE
6.0.0.0.0 Design
Construction Manager as Constructor

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

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

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

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

Verify Shell and T.I., Validate Funding Sources

Coordinate with A/A Fabrication and Installation 7.1.4.0.0.0

Finalize/issue construction bid documents

OA Update 8.1.1.3.0.0

Independently

OCA

PBS-P100

Review and IGE

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

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

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

Verify Shell and T.I., Validate Funding Sources

Coordinate with A/A Fabrication and Installation 7.1.4.0.0.0

Finalize/issue construction bid documents

OA Update 8.1.1.3.0.0

Independently

OCA

PBS-P100

Review and IGE

This page applies to:

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

GSA - Public Buildings Service  6.9.0.0.0.0  Design Page 42
6.0.0.0.0 Design

Construction Manager as Constructor

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

Project Team determines the need for CD Program Review Workshop

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

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

Review PMP 1.1.1.0.0.0.b

Is the program within scope and budget?

Similar to Concept Program Review

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

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

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

Review PMP 1.1.1.0.0.0.b

Is the program within scope and budget?

Yes

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

CMa conducts review and IGE

Project Team reviews submission and prepares comments

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

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

Review and update Cx Plan as needed

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

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

Comprehensive Review Checklists are available in Appendix A

Is the program within scope and budget?

No

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

Update OAs as needed 8.1.1.3.0.0

This page applies to:

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

LINKS

PBS-P100  PMP Reference

Professional Services Estimating Tool

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

Construction Manager as Constructor

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

Is the program within scope and budget?

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

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

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

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

OCA completes compliance review, scope review and IGE

OCA provides feedback to regions for the 100% CD submission

Is the program within scope and budget?

OCA completes IGE to insure project is within budget

Will OCA order IGE?

Yes

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

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

No

Project Team updates checklists as needed

OCA provides feedback to regions for the 100% CD submission

Update OAs as needed 8.1.1.3.0.0

This page applies to:

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

GSA - Public Buildings Service

6.7.13.0.0

Design Page 44
6.0.0.0.0 Design

Construction Manager as Constructor

6.7.12.0.0 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
- Project Team submits 100% CDs and A/E estimate to CMa for review and IGE
- Project Team ensures any changes requested in previous reviews are included in the 100% CDs
- Is the program within scope and budget?
  - Yes: Project Team utilizes 100% CDs as the basis for Construction Procurement Documents
  - No: A/E updates checklists as needed

- 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
- Update OAs as needed 8.1.1.3.0.0

- CxA review as specified in Cx Plan

LINKS

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

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

Construction Manager as Constructor

6.4.10.0.0.0 Construction Contract Award
(Exercise GMP Option)

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

GC/CC submits final construction option pricing.

Project Team reconciles GC/CC proposal with IGE.

Are negotiations required on scope or pricing?

Yes

Project Team develops negotiating strategy.

Negotiations are conducted with GC/CC.

Is Project Team able to reach an agreement on scope and pricing?

Yes

Project Team requests allowance documents from OCA/PBS Budget Office.

No

Redesign or commence SS for new GC/CC.

Exercise GMP option for construction and publish Award Announcement.

Initiate security clearance process for CC personnel.

CO requests bonds and insurance.

Project Team receives, reviews, and approves submittals.

CO prepares to issue NTP.

Allowance documents are received by Project Team.

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

Construction Manager as Constructor

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

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
6.10.14.0.0.0.b Construction Contract Award
6.10.15.0.0.0.b Pre-NTP Documents (Bonds, Insurance, Security, etc.)
8.0.0.0.0.0 Tenant Occupancy

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.

The CDs can be conformed with all amendments as deemed appropriate.

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

GSA - Public Buildings Service
6.10.14.0.0.0.b
Construction Page 1
Determine professional services needed for construction administration

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

Examples: IH, various testing, utility services, move coordination, etc.
Project Team coordinates meeting with commissioned artist, A/E and GC/CC 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
Construction Manager as Constructor
7.1.0.0.0.0 (0% to 100% Construction)

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
7.1.0.0.0.0 (0% to 100% Construction)
8.0.0.0.0.0 Tenant Occupancy

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc
7.1.1.0.0.0 Notice To Proceed

CO issues NTP

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

Conduct Partnering Session 7.1.3.0.0.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

Conduct Partnering Session 7.1.3.0.0.a

This page applies to:

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

LINKS

Sample NTP Letter

GSA - Public Buildings Service 7.1.1.0.0.0 Construction Page 5
7.0.0.0.0 Construction

Construction Manager as Constructor

7.1.2.0.0.0 Construction Kick-off Meeting

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

Project Team 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

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

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

7.1.2.0.0.0 Construction Kick-off Meeting

8.0.0.0.0.0 Tenant Occupancy

LINKS
- Sample Kick-off Meeting Agenda
- Suggested Stakeholders Invitation List
- PMP 1.1.1.0.0.0.b
7.0.0.0.0 Construction
Construction Manager as Constructor
7.1.3.0.0.0.a Partnering Session

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

**Project Team** discusses upcoming partnering session.

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

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

**Selection process:** consultant or in-house?

**Issue a task order for Project Consultant 6.1.0.0.0.a**

**In-house**

CMa may hire consultant as provided in SOW.

**Project Team** identifies in-house facilitator and determines availability.

**Project Team** invites stakeholders and develops agenda.

**Project Team** conducts Partnering Meeting.

**Facilitator issues Partnering Charter and report from the meeting.**

**LINKS**

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

**This page applies to:**

- Traditional
- D/B
- D/B-Bridging
- CMc
Option A: Holding partnering concurrently with kick-off:

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

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

Option B: Delaying partnering until after kick-off:

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

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

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

- Consult with Office of Customer Service: Is groundbreaking needed?
  - Yes
    - Determine stakeholders and local dignitaries to invite to ceremony
    - Determine date of groundbreaking
    - Coordinate logistics
    - Have ceremony
  - No
    - Construction Administration 7.1.6.0.0.0.a

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

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMC
Construction Manager as Constructor

7.1.6.0.0.0.b Construction Administration (Overview)

All of these processes are concurrent.

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

Project Team reviews and approves construction schedules 7.1.6.2.0.0

GC/CC prepares submittal schedule, Log and Submissions 7.1.6.4.0.0

GC/CC coordinates testing schedule law contract 7.1.6.5.0.0

CMa prepares and monitors QA Plan 7.1.2.0.1.2

CMa/CxA conducts or prepares inspection schedule/reports 7.1.6.5.0.0

GC/CC installs project Web-Cam 7.1.6.1.1.1

PM/CO coordinate and manage contract modifications 7.1.6.8.0.0

CMa prepares special testing/mockup plans/reports

CO processes progress payments law contract specifications and approved schedule

Project Team reviews and manages project costs 7.1.6.0.0.1.b

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

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

Project Team conducts regularly scheduled “progress” meetings. Project updates are provided by disciplines as needed. Special meetings may be called at the discretion of the Project Team.

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

Accept plan?

Yes

No

Provide feedback to contractor

Project Team implements and monitors safety plan

Project Team receives reports

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc
Project Team reviews project budget

Update project budget with additional construction information

Periodically monitor and update budget based on change orders and projections

Update OAs to reflect construction changes as necessary

Update PIP to reflect construction changes as necessary

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

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

**Construction Manager as Constructor**

*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
- CMa prepares log and tracks the RFI
- Responsible party reviews and responds
- Respond to contractor
- Contractor reviews response
- Determine if response is a change order

**Does response merit change order?**

- Yes: GC/CC Contract Modifications
- No: GC/CC implements response

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

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

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

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

Construction Manager as Constructor

7.1.6.2.0.0 Construction Schedules

The preliminary and baseline schedules are reviewed by a GSA, CMa, and/or outside scheduling consultant.

- GC/CC contractor submits preliminary CPM schedule
- Review schedule
- Is preliminary schedule accepted?
  - Yes
  - No
  - Provide feedback to GC/CC
- GC/CC submits baseline schedule
- Project Team reviews baseline schedule
- Is baseline schedule approved?
  - Yes
  - No
  - Provide feedback to contractor
  - Cost loaded schedule must be approved as provided in CPM examples
  - 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

Links:
- CPM Examples
- Project Updates in PIP 1.1.3.2.0.0

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc
GC/CC contractor prepares and delivers submittal schedule

Is submittal schedule accepted?

Yes

Project Team establishes process to track submittals

Manage and update submittal log via monthly/weekly scheduled meetings

No

Provide feedback to contractor

Review submittal schedule

Schedule reviewed by A/E, GSA, and CMa

Refer to specifications for submission requirements

Typically managed by CMa

Sample Submittal Schedule

This page applies to:

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

GSA - Public Buildings Service 7.1.6.4.0.0
GC/CC submits project specific QAQC Plan including inspection and report schedules

GSA, A/E, and CMa review QAQC Plan

Is QAQC Plan accepted?

Yes

Project Team implements QAQC Plan

Contractor provides progress reports via regularly scheduled meetings

No

Refer to Design Quality Review Guide (new appendix A-6, PBS-P100) (OCA development December 2004)

Provide feedback to GC/CC

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

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

LINKS

Building Cx Guide  Cx Plan  PBS-P100

PPT  Inspections and Testing Schedule 7.1.6.5.0.0

This page applies to:

☑ Traditional  ☑ D/B  ☑ D/B-Bridging  ☑ CMc
GC/CC inspects and
tests
GSA inspects and
tests
GC/CC submits
results reports to
CMa
Project Team
submits results
reports to contractor
Conduct test
Do specifications require GC/CC or GSA testing?
GC/CC coordinates
testing schedule
GSA
GC/CC inspects and
tests
GSA inspects and
tests
Coordinate testing
schedule with CMa
and tenants
Project Team
coordinates testing
schedule with GC/CC
and tenants
Periodically check tests
to make sure there are
no abnormalities
Yes
No
Pass?
No
Evaluate results
Accept?
Yes
Proceed and file
report
Provide feedback to
contractor; GC/CC
correct deficiencies
Yes
No

7.0.0.0.0 Construction
Construction Manager as Constructor
7.1.6.5.0.0 Inspections and Testing Schedule

LINKS

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

GSA - Public Buildings Service 7.1.6.5.0.0 Construction Page 18
GC/CC identifies special testing/mockup plans/reports

Project Team reviews contractor's mockup testing/inspection schedule

Contractor conducts test/inspection

Contractor submits results/reports to GSA/CMa

Pass?

Yes

Proceed and document

Evaluate results

Accept?

Refer to project specifications for requirements

Provide feedback to contractor

No

No

No
7.0.0.0.0 Construction

Construction Manager as Constructor

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

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

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

Contingency funds may be used only for errors or omissions!

Is the request valid?

Yes

Obtain necessary funding documents

Issue RFP

GC/CC responds to RFP

CMa analyzes request proposal

Negotiate

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

No

Deny request
Evaluations of contractor past performance are required under FAR. Past performance evaluations are a part of future procurement evaluations criteria.

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

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

The PM and CO typically complete the evaluations.

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

Go to the NIH Website and complete the evaluation form.

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

**LINKS**

NIH  Sample Evaluation Form

<table>
<thead>
<tr>
<th>This page applies to:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Traditional</td>
</tr>
</tbody>
</table>
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.

Is follow-up Partnering Session needed?

No

Is further action required?

Yes

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?

In-house Facilitator

Consultant

Issue a Task Order for Project Consultant 6.1.0.0.0.0.a

CMa may hire consultant as provided in SOW

Project Team identifies in-house facilitator and determines availability

Project Team invites stakeholders and develops agenda

Project Team conducts Partnering Meeting

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

In-house Facilitator

This page applies to:

☐ Traditional  ☑ D/B  ☑ D/B-Bridging  ☑ CMc
Determine frequency of update required

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
7.0.0.0.0 Construction
Construction Manager as Constructor

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

Project Team coordinates with OCA

OCA requests and Project Team completes survey form

OCA coordinates schedule and participates in peer review

Peer review team prepares report

Project team develops action plan

No peer review necessary

No

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

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

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

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

List of OCA Construction Excellence Council

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc
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
Construction Manager as Constructor

7.1.13.0.0.0 Additional Phases Delivery (TI, Phases, Annexes)

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
3.0.0.0.0.0 Authorization/Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design/Build
6.0.0.0.0.0 Design
7.0.0.0.0.0 Construction
7.1.13.0.0.0 Additional Phases Delivery (TI, Phases, Annexes)
8.0.0.0.0.0 Tenant Occupancy

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

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc
7.0.0.0.0 Construction
Construction Manager as Constructor
7.1.14.0.0.0 Turnover Documents

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

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
Construction Manager as Constructor

7.1.14.3.0.0 O&M Manuals Submittal

1. 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.

2. CMa/CxA establishes list of O&M Manuals

3. CMa/CxA schedules submission of O&M Manuals

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

5. CMa/CxA develops format for O&M manuals

6. Prepare O&M Manuals

7. Submit O&M Manuals

8. Review O&M Manuals

9. Comment

10. Pass or Fail?

   - Pass
     - Proceed with Property Management Training
     - CMa/CxA establishes list of O&M Manuals
     - CMa/CxA schedules submission of O&M Manuals
     - CMa/CxA identifies who will prepare and receive O&M Manuals
     - CMa/CxA develops format for O&M manuals
     - Prepare O&M Manuals
     - Submit O&M Manuals
     - Review O&M Manuals
     - Comment
     - Proceed with Property Management Training

   - Fail
     - Withhold percentage of payment

This page applies to: Traditional, D/B, D/B-Bridging, CMc
7.0.0.0.0 Construction
Construction Manager as Constructor
7.1.14.4.0.0 Warranties and Certifications

Using PMP, CMa/CxA establishes list of warranties and certifications

Determine requirements for start date of warranties and certifications

Identify who will prepare and receive warranties and certifications

Prepare warranties and certifications

Submit warranties and certifications

Review warranties and certifications and report status to Project Team

Project Team reviews and comments

Pass or Fail?

Pass

Fail

Withhold percentage of payment

Contract Record Drawings
7.1.14.7.0.0

LINKS

Cx Plan

PMP Reference

Submittal Schedule/Logs/Submissions
7.1.6.4.0.0

This page applies to:

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

GSA - Public Buildings Service
7.1.14.4.0.0

Construction Page 30
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 → Property Manager is key player

Withhold percentage of payment

Property Manager is key player.
Using PMP, CMa/CxA establishes list of contractor record drawings required

Determine requirements for contractor record drawings

Identify who will receive and secure contractor record drawings

Submit contractor record drawings

Verify correct documentation/as-builts of contractor record drawings

Project Team reviews and comments

Pass? No → Withhold percentage of payment
Yes →

A/E or Contractor?

Contractor → Complete and distribute as directed by Project Team
A/E → Prepare record documents from contractor redlines 7.2.1.0.0.0

LINKS

PMP Reference A/E Contract for Design 6.2.6.0.0.0

This page applies to:

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

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

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

Schedule start-up and testing

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

Identify special testing equipment

Develop format for start-up and testing

Perform start-up and testing

Develop punch lists and send to contractor

Contractor takes corrective action

Re-test

Pass?

Substantial Completion Certification 7.1.15.0.0.0.a

This page applies to:

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

LINKS

- Cx Plan
- PMP Reference
- Quality Control Plan 7.1.2.0.1.2
- Submittal Schedule/Log/Submissions 7.1.6.4.0.0
- Inspections and Testing Schedule 7.1.6.5.0.0
- Special Testing/Mock-up Plans/Reports 7.1.6.6.0.0
- Turnover Documents 7.1.14.0.0.0
- Substantial Completion Certificate: Final Completion 7.1.15.0.0.0.c
- Occupancy Permit 7.1.16.0.0.0

Use O&M Manuals
Following the PMP, CMa/CxA establishes list of items requiring training. Document the training in digital format and save to the EMS. Develop format for training (digital, online, video). Identify who will receive training. Schedule training and coordinate with Project Team. Perform training. Project Team reviews and comments. 

Pass?

- Yes
  - Complete

- No
  - Withhold percentage of payment

This page applies to:

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

LINKS

- Cx Plan
- O&M Manuals
- Submittals
- 7.1.14.3.0.0

GSA - Public Buildings Service 7.1.14.0.0.0 Construction Page 34
Contractor Requests Substantial Completion Certification

Substantial Completion Certificate: Final Cleaning
7.1.15.0.0.0.b

Receive Occupancy Permits
7.1.16.0.0.0

Final Inspections Completed and Accepted
7.1.14.1.0.0.a

Punch Lists
7.1.14.1.0.0.b

Substantial Completion Certificate: Final Completion
7.1.15.0.0.0.c

Verify Testing is Completed
7.1.14.2.0.0

Turnover Documents Received
7.1.14.0.0.0

Final OA
8.1.1.5.0.0

Tenant Move-in
8.2.6.0.0.0

Final Cx Report Received

Contractor makes Corrections

Are all Items complete and accepted by CO?

CO Issues Substantial Completion Letter to Contractor

Make sure retention is held for final completion

Inform central office of substantial completion

Update PIP for substantial completion

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

LINKS

O&M Manuals
Submittals
7.1.14.3.0.0
7.0.0.0.0 Construction
Construction Manager as Constructor

7.1.15.0.0.0.b Substantial Completion Certificate: Final Cleaning

- Punch Lists
  - Establish schedule for final cleaning
  - Clean according to cleaning specifications in contract
  - Pass?
    - Yes: Closeout (Admin)
    - No: Make sure retention is held for final cleaning

**Links**
- Substantial Completion Certificate: Final Completion
  - 7.1.15.0.0.c

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

GSA - Public Buildings Service

7.1.15.0.0.0.b

Construction Page 36
Project Team coordinates/directs tasks for occupancy permits required

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

GSA Passes?

Yes

Building occupancy

Food Service will require outside permits

No

Receive elevator permits

Make Corrections

Return to pass/fail

Other/ environmental parties

Yes

Determine security testing responsibilities and request final testing

FPS/USMS Passes?

No

This page applies to:

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

LINKS

Punch Lists

7.1.14.1.0.b

Systems Start-up and Testing

7.1.14.2.0.0

O&M Manuals Submittals

7.1.14.3.0.0

Substantial Completion Certificate: Final Completion

7.1.15.0.0.0.c

GSA - Public Buildings Service

7.1.16.0.0.0
7.0.0.0.0 Construction

Construction Manager as Constructor

7.1.14.1.0.0.a Final Inspections

Substantial Completion Certification

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

7.1.14.1.0.0.a Final Inspections

8.0.0.0.0.0 Tenant Occupancy

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

1.1.1.0.0.0.b

Initiate Punch Lists

7.1.14.1.0.0.b

Identify who will conduct final inspection and include tenant

Schedule final inspection

Develop format for final inspection

Perform final inspection

Inspection Passed?

Yes → Start closeout process

No → Develop lists and send to contractor

This page applies to:

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

LINKS

PMP Reference

Turnover Documents

7.1.14.0.0.0

Substantial Completion Certificate: Final Completion

7.1.15.0.0.0.c

GSA - Public Buildings Service

7.1.14.1.0.0.a

Construction Page 38
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

Contractor corrects

Yes

Other forces correct?
7.0.0.0.0 Construction
Construction Manager as Constructor
7.1.15.0.0.0.c Substantial Completion Certificate: Final Completion

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

8.0.0.0.0.0 Tenant Occupancy

LINKS

Turnover Documents 7.1.14.0.0.0
Final Inspections 7.1.14.1.0.0.a
Punch Lists 7.1.14.1.0.0.b

Systems Start-up and Testing 7.1.14.2.0.0
O&M Manuals Submittal 7.1.14.3.0.0
Substantial Completion Certificate: Final Cleaning 7.1.15.0.0.0.b

Occupancy Permit 7.1.16.0.0.0

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

Contractor completes all tasks

Receive turnover documents

Complete and accept final inspections

Receive occupancy permits

Receive and complete substantial completion certification

Complete final cleaning

Pass?

Yes

Issue Substantial Completion Certification 7.1.15.0.0.0.a

No
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.
**Construction Manager as Constructor**

**8.3.4.0.1.2 Maintenance and Cleaning Contracts (GC/CC Option)**

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

2. Will government utilize option or procure new contract?
   - **Yes**
     - Project Team defines scope of maintenance and cleaning.
     - Coordinate with PM on pending turnover date.

   - **No**
     - Refer to property management criteria.
     - Conserved of art.
     - Special requirements (e.g., environmental).

3. 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 with contract.

---

**LINKS**

- **PMP Reference**
  - O&M Manuals Submittals 7.1.14.3.0.0
  - Warranties and Certifications 7.1.14.4.0.0

- **Property Management Training** 7.1.14.5.0.0

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

---

**This page applies to:**

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

1. CMa verify redlines are up to date
2. Exercise GC/CC option or amend A/E contract for record documents
3. Receive as-built documents from GC/CC
4. A/E prepares record documents from as-built drawings/documents
5. Ensure PBS CAD standards are enforced
6. A/E submits record documents to appropriate parties (regional CIO, tenants, field office)
7. Pay A/E (or GC/CC) and close out contract

LINKS

- Cx Plan
- QAQC Plan
- Program Development Study
- A/E Contract for Design
- Construction Administration
- Contractor Record Drawings
- Contract Closeout (GC/CC)

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

Construction Manager as Constructor

7.2.0.0.0 Updated PBS CAD Library Submission

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

7.2.0.0.0 Updated PBS CAD Library Submission

8.0.0.0.0 Tenant Occupancy

Project Team receives A/E Record Documents 7.2.1.0.0.0

Regional CIO or librarian accepts submission

Back check format and content

Is everything there?

Yes → Proceed to Project Closeout

No → A/E takes corrective action

QAQC should address CAD Library submissions

This page applies to:

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

GSA - Public Buildings Service 7.2.2.0.0.0 Construction Page 44
Project Team contacts Customer Service/Marketing to advise of project completion

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

Contact marketing department to notify of completion

Contact appropriate parties to establish ceremony date

Establish ceremony committee

Identify source of funds

Identify number of attendees to schedule facility

Develop invitation list

Provide fact sheets for press releases

Identify stage/dais size and procure

Project funds, RWA, community, etc.

Pay invoices and release claims

Tear down facility

Write purchase orders for procured items

Set up facility

Procure mementos

Obtain religious figures for invocation and benediction

Obtain a band

Print and mail invitations

Develop program

Identify source of funding for refreshments

Identify sound and lighting system and procure

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

Project CO typically manages these actions with PM CO

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc
7.0.0.0.0 Construction
Construction Manager as Constructor

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

Project Team provides information for award criteria

- LEED
  - Cx Plan/Report
- EnergyStar
- AiA
  - A/E
- PM
- GSA Design Awards (Biennial)

1.0.0.0.0 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
7.2.5.0.0.0 Project Awards (LEED, EnergyStar, AiA, PM, etc.)
8.0.0.0.0 Tenant Occupancy

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

GSA - Public Buildings Service

Construction Page 46
7.0.0.0.0 Construction
Construction Manager as Constructor
7.2.3.1.0.0 Contract Closeout (GC/CC)

7.2.3.1.0.0 Contract Closeout (GC/CC)

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

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

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc
7.0.0.0.0 Construction
Construction Manager as Constructor
7.2.3.2.1.0 Project Management Closeout

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

This page applies to:
- Traditional
- C/Mc
- D/B
- D/B-Bridging
- GSA - Public Buildings Service

Some of these processes/tasks are concurrent.

- Project Team verifies Substantial Completion Certificate: Final Cleaning
- Project Team completes following tasks for PM closeout
- Develop lessons learned
- Complete GC/CC evaluations (NIH) 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

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

Closeout (Admin) 7.2.0.0.0.0
GSA - Public Buildings Service 7.2.3.2.1.0 Construction Page 48
Project Team verifies Substantial Completion Certificate: Final Cleaning

Project Team completes tasks for financial closeout

Close out RWAs if open

Return balance of funds to appropriate parties

Concurrent

Retain for possible interest payments from final invoice

Is interest due?

Yes

Pay interest

No

Close out items from GSA Financial System

Pay

Process all final payments

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

LINKS

RWA

This page applies to:

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

GSA - Public Buildings Service 7.2.3.2.0.0 Construction 7.0.0.0.0 Financial Closeout

Real Property Acquisition Advice (GSA Form 1011) 8.1.3.0.1.0

Construction Page 49
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
8.1.3.0.1.0 Real Property Acquisition Advice (GSA Form 1011)
7.0.0.0.0 Construction
8.0.0.0.0 Tenant Occupancy

7.0.0.0.0 Construction Manager as Constructor
8.1.3.0.1.0 Real Property Acquisition Advice (GSA Form 1011)

Project Team evaluates GC/CC performance to date

GC/CC submits final construction option pricing

Project Team reconciles CC proposal with IGE

Are negotiations required on scope or pricing?

Yes

Project Team develops negotiating strategy

No

Project Team requests allowance documents from OCA/PBS Budget Office

Allowance documents are received by Project Team

Exercise GMP option for construction and publish Award Announcement

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

Initiate security clearance process for GC/CC personnel

CO requests bonds and insurance

Project Team receives, reviews, and approves submittals

Project Team reviews PMP and Acquisition Plan to confirm strategy and timing for NTP

CO prepares to issue NTP

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
8.1.3.0.1.0 Real Property Acquisition Advice (GSA Form 1011)
7.0.0.0.0 Construction
8.0.0.0.0 Tenant Occupancy

This page applies to:

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

LINKS

Acquisition Plan  PMP Reference

Notice To Proceed 7.1.1.0.0.0
8.0.0.0.0 Tenant Occupancy
Construction Manager as Constructor

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc
8.0.0.0.0 Tenant Occupancy
Construction Manager as Constructor

8.1.0.0.0.0 Occupancy Agreements and RENT (Overview)

New or revised tenant space

Begin preparation of OA

No OA required

Extent/type of project?

Limited Scope

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

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

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

Begin preparation of OA

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

This page applies to:

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

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

Transmit OA to agency for review

Does agency agree?

Signed OA

Review requirements used to develop cost estimate

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

Linked resources:
- PBS Pricing Desk Guide
- Pricing Implementation for Project Management
- Feasibility 2.4.1.0.0.0
- 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

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMC
8.0.0.0.0 Tenant Occupancy
Construction Manager as Constructor

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

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

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

- 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

**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-Bridging
- CMc
8.0.0.0.0 Tenant Occupancy

Construction Manager as Constructor

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

Is budget sufficient to cover cost estimate?

Yes

Develop cost/revise estimates based upon prospectus scope

Signed OA

Determine revisions to requirements

No

Conduct analysis to determine if budget is sufficient to cover cost estimate

Does agency agree?

Yes

Revise design to get within budget

No

Has the TI estimate changed?

Yes

Obtain the RWA

No

Is agency asking for increased scope?

Yes

Determine estimate for the RWA

No

Accept OA stands

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

 많은 도움이 되었습니다. 다른 도움이 필요하시면 언제든지 말씀해 주세요. }

This page applies to:

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

GSA - Public Buildings Service

8.1.1.4.0.0 Tenant Occupancy Page 5
8.0.0.0.0 Tenant Occupancy
Construction Manager as Constructor

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

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

Are budgets sufficient to cover construction proposal costs?

Yes

Has the TI estimate changed?

Yes

Revise OA using proposal costs

No

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

Award contract

Signed OA

Does agency agree?

Yes

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

No

Redesign or cancel project

No

No

Transmit to agency for review

Yes

Does agency agree?

Signed OA

Does agency agree?

Yes

Award contract

Signed OA

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

No

Redesign or cancel project

Yes

Revise OA using proposal costs

LINKS

PBS Pricing Desk Guide

Pricing Implementation for Project Management

Feasibility

PDS

Concept Design (Overview)

Design Development (Overview)

Construction Documents

GC/CC Source Selection Plan

(0% to 100% Construction)

This page applies to:

Traditional  ✔ D/B  ✔ D/B-Bridging  ✔ CMc
8.0.0.0.0 Tenant Occupancy
Construction Manager as Constructor

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

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

No

Proceed with construction

Revise OA

Transmit to agency for review

Does agency agree?

Yes

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

Obtain signature

LINKS

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

This page applies to:
- Traditional
- D/B
- D/B-Bridge
- CMc
8.0.0.0.0 Tenant Occupancy
Construction Manager as Constructor
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

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

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

8.0.0.0.0.0 Tenant Occupancy
Construction Manager as Constructor
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

Are there any changes from last signed OA?

Does agency agree?

Signed OA

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

Start RENT 8.1.3.0.0.0

Charge RENT pending mediation with agency on outstanding costs

SOL

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

Final OA (Reconciliation) 8.1.1.5.0.0

Tenant Occupancy Page 8
8.1.1.5.0.0 Final Occupancy Agreement (Reconciliation)

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

8.1.1.5.0.0 Final Occupancy Agreement (Reconciliation)

- Calculate RENT by ABC
- Transmit to agency for review
- Develop final OA (reconciliation)
- Finalize project costs
- Does Agency agree?
- Are there any changes from final OA?
- Signed OA
- Finalize OA in STAR

LINKS

- PBS Pricing Desk Guide
- Pricing Implementation for Project Management
- Feasibility 2.4.1.0.0.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
Project Team identifies funding source(s)

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

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

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

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

LINKS

BOMA Space Measurement Standards

National CAD/CIFM Standards

PBS-P100 OAs and RENT (Overview) 8.1.0.0.0

This page applies to:

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

Construction Manager as Constructor

8.1.3.0.0.0 Initial RENT Start

---

Final OA 8.1.1.5.0.1

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
7.0.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy

8.1.3.0.0.0 Initial RENT Start

**Project Team receives/prepares documents for processing RENT billing**

- **Substantial Completion Certification 7.1.15.0.0.0.a**
- **Final OAs 8.1.1.5.0.1**
- **Real Property Acquisition Advice (GSA Form 1011) 8.1.3.0.1.0**

- **Enter Shell, TI, operating and security costs into STAR**
- **Amortize appropriate capital costs**
- **Estimate building OT usage bills**
- **Send notification to agencies**

- **Initiate RENT billing**
- **Inform central office of initial RENT start**
- **Update PIP for performance measure**

**LINKS**

- PBS Pricing Desk Guide
- Pricing Implementation for Project Management

**This page applies to:**

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

---

GSA - Public Buildings Service

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

- **Systems Furniture**
  - 8.2.1.0.0.0

- **Telecommunications Coordination and Installation**
  - 8.2.2.0.0.0.a

- **Agency IT/Data Systems**
  - 8.2.3.0.0.0

- **Security Systems Installation**
  - 8.2.4.0.0.0

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

- **Tenant Move-In**
  - 8.2.6.0.0.0

- **Initial RENT start**
  - 8.1.3.0.0.0

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

This page applies to:

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

---

**This page applies to:**

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

8.2.1.0.0 Systems Furniture

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

Does tenant need new furniture?

Yes

Will agency use in-house sources or FSS?

In-house

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

A/E

Provide A/E estimate for inventory and furniture design

Obtain RWA from agency for furniture inventory and design

Agency coordinates layout with design A/E

Agency procures, installs, and inspects furniture installation

Agency coordinates with Project Team

Integrate into CPM schedule

In-house

Agency coordinates with GSA field office for move of existing furniture

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

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

Federal Supply procures, installs, and inspects furniture installation

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

Does tenant need new furniture?

No

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

Agency coordinates layout with design A/E

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

Agency coordinates layout with design A/E

Additional Phases Delivery (IT, Phases, Annexes) 7.1.13.0.0.0

Links

PDS 2.5.0.0.0.0

DD Submission (35%) 6.8.5.0.0.0

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

This page applies to:

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

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

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

Agency procures, installs, and inspects telecommunications system installation

Does tenant need new telecommunications system?

Yes

Telecommunications Contracts

No

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

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

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

Tenants are responsible for horizontal wiring and connections. FTS provides service only.

Cost Estimates from FS 2.4.1.0.0.0.b

PDS Design Programming 2.5.0.0.0.0
Will agency use in-house sources or FTS?

In-house

Agency coordinates telecommunications system design A/E

Agency procures, installs, and inspects telecommunications system installation

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

Develop Telecommunications Contract

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

In-house

A/E

Provide A/E estimate for inventory and telecommunications system design

Obtain RWA from agency for telecommunications system inventory and design

FTS

Will tenant use in-house sources or FTS?
Tenant provides requirements for cabling and infrastructure

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

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

Integrate into CPM schedule

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

Telecommunications Installation 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

Tenant provides requirements for cabling and infrastructure

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

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

Integrate into CPM schedule

LINKS

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

This page applies to:

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

GSA - Public Buildings Service 8.2.3.0.0.0 Tenant Occupancy Page 16
8.0.0.0.0 Tenant Occupancy
Construction Manager as Constructor

8.2.4.0.0.0 Security Systems Installation

Project Team commences major security discussion in preparation for PDS

PDS Design Programming 2.5.0.0.0.0

Does tenant need new security system?

No

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

Yes

Will agency use in-house sources or DHS FPS?

In-house

Agency coordinates security system design with A/E

FPS

In-house

Agency procures, installs, and inspects security system installation

A/E provides security system design

Obtain RWA from agency for security system design

Provide A/E estimate for security system design

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

DHS FPS tests, inspects, and accepts security system

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

DD Submission (35%) 6.8.5.0.0.0

Security Design Requirements

CD Submission (60-75%) 7.1.13.0.0.0

Additional Phases Delivery

LINKS

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

This page applies to:

Traditional ✓ D/B ✓ D/B-Bridging ✓ CMc
8.0.0.0.0 Tenant Occupancy
Construction Manager as Constructor

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%)

CD Submission
(60-75%)

Security Design
Requirements

Additional Phases
Delivery
7.1.13.0.0.0

A/E provides design IAW Pub 64

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

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

USMS inspects and reviews

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

Establish acceptance procedure and documentation with USMS

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

Contact USMS

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

This page applies to:

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

GSA - Public Buildings Service

Tenant Occupancy 8.0.0.0.0

Tenant Occupancy Page 18
8.0.0.0.0 Tenant Occupancy
Construction Manager as Constructor
8.2.6.0.0.0 Tenant Move-In

Project Team coordinates, negotiates, and mediates move in

Who will perform the move?

Tenant coordinates move schedule with GSA property manager

Tenant moves

Establish scope

Establish responsibilities

Responsibilities, costs, funding, and schedules established

Establish cost

Tenants move in

Who will pack?

GSA provides boxes, labels, and instructions for destination

Obtain quotes from move vendors

Survey existing space

Survey furniture and equipment

Establish move-in schedule

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

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

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

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

LINKS
- Furniture, Fixtures, and Equipment (FFE)/Move-In (Overview) 8.2.0.0.0
- Security Systems Installation 8.2.4.0.0.0

Initial RENT
Start 8.1.3.0.0.0

Project Coordination 1.1.0.0.0.0