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

2.1.0.0.0 Pre-Project Planning (Overview)

Pre-Project (Preliminary) Planning

Is it a capital project?

Yes

Commence FS 2.4.1.0.0.0

Select the best alternative

Select project delivery method and prepare PMP and AOP 1.1.1.0.0.0

Traditional or CMc

Design/Build Bridging

Design/Build

Lease Construction

Site and Design Prospectus Submission

Submit Site Prospectus

Lease PDS

Site and Design Authorization

Design/Build PDS 2.5.0.0.0.0

Design/Build Prospectus Submission

Lease Prospectus Submission

PDS 2.5.0.0.0.0

Construction Prospectus Submission

Design/Build Authorization

Construction Authorization 3.4.0.0.0.0

To be developed in Phase II

Overview of Capital Investment and Leasing Program (CILP) process

PROJECT

PROJECT

PROJECT

PROJECT

PROJECT

PROJECT

PROJECT
1.0.0.0.0.0 Project Management Documents
Construction Manager as Constructor
1.1.0.0.0.0.a Project Coordination

1.1.1.0.0.0.b Project Coordination exists at every level

1.1.5.0.0.0 Project Website(s)

PMP

Design Start-up Workshop 6.1.1.0.1.0

PiP

Assemble Project Team 1.1.1.0.0.0.a

Pre-Project (Preliminary) Planning 2.1.0.0.0.1

Feasibility 2.4.1.0.0.0.a

PDS 2.5.0.0.0.0

Site Acquisition 4.0.0.0.0.0.a

This page applies to:

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

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

**Construction Manager as Constructor**

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

Asset Manager assembles Project Team

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

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

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

**LINKS**

- Pre-Project (Preliminary) Planning 2.1.0.0.0.1
- NHPA 2.2.0.0.0
- NEPA 2.3.0.0.0
- Feasibility 2.4.1.0.0.0.a
- PDS 2.5.0.0.0.0
- Site Acquisition 4.0.0.0.0.a

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

GSA - Public Buildings Service

1.1.1.0.0.0.a

Planning Page 5
2.0.0.0.0 Planning
Construction Manager as Constructor
2.1.12.0.2.0 Existing Conditions Assessments

Existing condition assessments are required to develop scope and costs for R&A alternatives.

- 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

Is additional information needed?

No

Obtain additional information

Incorporate assessments into FS or PDS if D/B

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

Feasibility 2.4.1.0.0.0.a
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

Project Team reviews appropriate LPP

No

ABT will prioritize in small projects process (BA54)

Or

Project Team will study viable alternatives in FS 2.4.1.0.0.0.a

PDS if D/B 2.5.0.0.0.0

Is it a capital project?

Yes

No

Links

Feasibility 2.4.1.0.0.0.a

This page applies to:

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

1. Project Team reviews current Master Plan
2. Would an updated Master Plan benefit the project?
   - Yes: Project Team develops scope, obtains funding, and issues work order for Master Plan
   - No: Respond to individual requests independently
3. Project Team confirms clients' short-term and long-term needs
4. Update Master Plan as appropriate
BERs provide scope and cost estimates for building system's needs. A BER consists of 4 distinct levels. The first 3 levels are typically accomplished in-house. Level 4 is typically accomplished by contract to support capital projects.

**Project Team reviews existing BER**

**Is it necessary to proceed to next level?**

- **Yes**
  - Complete Level 4 BER to support capital project submission
  - 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

- **No**
  - Project Team reviews open work item inventory in IRIS
  - Project Team evaluates and identifies all work items to be included in FS for R&A alternative

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

**Construction Manager as Constructor**

**2.1.3.1.0.0 Fire/Life Safety Study**

---

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

---

**LINKS**

PBS-P100

**This page applies to:**

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

- Project Team consults with Regional IH to determine existing information
- Hazardous Material Surveys are used to track and account for the presence of hazardous substances and to identify remediation, if required. In R&A projects, surveys identify the hazardous materials present and the associated costs for remediation. Surveys are also used in field office O&M plans.

Is additional information needed?

Yes
- Obtain additional information
- 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 Hazardous Materials Survey information into building O&M plan and/or work items for project scope
- This page applies to:
  - Traditional
  - D/B
  - D/B-Bridging
  - CMc

GSA - Public Buildings Service

Existing Conditions Assessments 2.1.12.0.2.0

2.0.0.0.0.0 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

Include in FS if R&A alternative cost evaluation or PDS if D/B

No

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

Regional term contract

Use Project Consultant Task Order 6.1.0.0.0.0.a

Include in FS Scope 2.4.1.0.0.0.a

Include in PDS if D/B 2.5.0.0.0.0

Project Team reviews current ABP

This page applies to:

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

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

LINKS
- ISC
- PBS-P100
**Energy Conservation Audit**

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

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

3. **Is this an existing building?**
   - **Yes**
     - Develop energy usage targets for new construction with central office
     - Incorporate energy conservation measures and/or energy usage targets into project scope and budget
   - **No**

4. **Is there an existing building energy audit?**
   - **Yes**
     - Conduct energy audit
   - **No**

**Links**

- Energy Center of Expertise
- HVAC Excellence and Specification
- PBS-P100

**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.b Feasibility (Continued)

Complete FS

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

Project Team will ensure design budget is adequate for CMa, CMc and CXa design phase services

**LINKS**

- DEP&P
  GSA Guidebook I – Acquisition of Real Property

- GSA Guidebook II – Relocation of Residents and Businesses
  NEPA

- NHPA
  PBS Pricing Desk Guide
  Pre-Project Planning Guide

- Pricing Implementation for Project Management
  Professional Services Estimating Tool

- PMP 1.1.0.0.0.b
  Pre-Project (Preliminary) Planning 2.1.0.0.0.1
  Existing Conditions Assessments 2.1.12.0.2.0

- Site Acquisition 4.0.0.0.0.0.a
  OAs and RENT (Overview) 8.1.0.0.0.0

**This page applies to:**

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

GSA - Public Buildings Service 2.4.1.0.0.0.b Planning Page 17
6.0.0.0.0 Design

Construction Manager as Constructor

6.3.0.0.0 CMA/Commissioning Authority (Cx) Services

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

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

Programmatic discussion may be found in the Building Cx Guide.

Planning

Project Team will need Cx assistance during preparation of the FS.

Develop preliminary Cx Plan and required budget in FS.

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

Design

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

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

Construction

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

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

Post Construction

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

LINKS

Building Cx Guide
PBS-P100
PPT

This page applies to:

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

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

GSA - Public Buildings Service
Planning Page 18
6.0.0.0.0.0 Design
Construction Manager as Constructor

6.1.0.0.0.0.a Project Consultant Task Order

Special Project Consultants may be needed throughout the project process

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

Project Team develops SOW

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

IDIQ, FSS or stand-alone contract

Project Team obtains IGE

CO issues RFP

CO receives proposals

CO evaluates proposals and prepares PNP

CO completes contract evaluations and advises Project Team of pending award

CO awards Project Consultant Contract
2.0.0.0.0 Planning
Construction Manager as Constructor

2.4.1.0.0.0.c Feasibility: R&A

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

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

This page applies to:

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

GSA - Public Buildings Service
Planning Page 20

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

GSA Guidebook I – Acquisition of Real Property
GSA Guidebook II – Relocation of Residents and Businesses
PBS-P100 WBDG PMP 1.1.1.0.0.0.b

Existing Conditions Assessments 2.1.12.0.2.0
NHPA 2.2.0.0.0.0 NEPA 2.3.0.0.0.0
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

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

LINKS

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

PBS-P100
PMP
Pre-Project (Preliminary) Planning

NHPA
NEPA

This page applies to:
☑ Traditional ☑ D/B ☑ D/B-Bridging ☑ CMc
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.a Site Acquisition

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

- Site Investigation for FS 4.0.0.0.0.0.c
- National Historic Preservation Act (NHPA) – Section 106 2.2.0.0.0.0
- National Environmental Policy Act (NEPA) Compliance 2.3.0.0.0.0
- Site Acquisition 4.0.0.0.0.0.a

GSA - Public Buildings Service

4.0.0.0.0.a Planning Page 23
### 2.0.0.0.0 Planning

#### Construction Manager as Constructor

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

**Diagram: Site Investigation Process**

1. **Project Team defines need for capital project**
2. **Project Team develops SOW for FS**
3. **Include in PDS if D/B**
4. **Site Team orders special studies**
5. **Site Team initiates preliminary NEPA and NEPA tasks**
6. **Project Team evaluates preliminary site data in FS or PDS if D/B**
7. **Project Team estimates site and relocation budget for site/design prospectus**
8. **Decision:**
   - **Yes:** ACQ required for capital project? (Further steps include site investigation tasks)
   - **No:** No further action required

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

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

**Links:**

- Fact Sheet on Executive Order 13006

**This page applies to:**

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

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
4.0.0.0.0.0.c Site Investigation for FS

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

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

Project Team assigns team roles and responsibilities.

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

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

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

Concurrent Activities

NHPA
RHPo coordinates with SHPO. RHPo briefs Project Team on progress of consultation(s)
2.2.0.0.0.0

Special Studies Due Diligence
Regional NEPA Program Coordinator manages/ coordinates studies (Due Diligence) with Site ACQ Specialist

NEPA
Regional NEPA Program Coordinator manages NEPA studies, public meetings, and mitigation measures. Coordinator provides regular updates to Project Team
2.3.0.0.0.0.0

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
4.0.0.0.0.0.0.a

Allow 6-12 months in project schedule

Allow 6-15 months in project schedule

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

Concurrent Activities

NLHPO

Special Studies

NEPA

Site Acquisition

LINKS

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

NEPA
NHPA
PBS-P100

PMP: Assemble Project Team
1.1.1.0.0.0.a

PMP
1.1.1.0.0.0.b
Planning
2.0.0.0.0.0
Relocation Planning
2.6.0.0.0.0

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

This page applies to:

Traditional

D/B

D/B-Bridging

CMc

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
- Incorporate mitigation into design documents
- Monitor MOA/PAs and mitigation throughout project delivery

- Budget for mitigation such as archaeology or HABS/HAER documentation, etc.
- Copy of MOA/PA to Advisory Council on Historic Preservation
- RHPO updates Project Team as needed
- This is an ongoing rather than an ending process

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

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

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

2.3.0.0.0.0 NEPA Tasks for FS through Site Acquisition

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

Include in PDS if D/B
Initiate NEPA in FS

Phase I may commence at Region’s discretion

Is this a CATEX?

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?

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

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

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

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

NEPA
NHPA

PMP: Assemble Project Team
PMP 1.1.1.0.0.0.a

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
2.6.0.0.0 Relocation Planning

**Construction Manager as Constructor**

**2.0.0.0.0 Planning**

Diagram:

1. **Coordinate with RHPO and NEPA Coordinator as issues are identified**
2. **Identify potential project sites and impacts from resident/business displacement**
3. **Review cost and schedule impacts for viable alternative sites**
4. **Incorporate relocation issues into site cost estimate for FS**
5. **Is there site-related relocation or swing space?**
   - Yes: Swing space
   - No: Identify the phasing plan assessing unique tenant requirements
7. **Review cost and schedule impacts of required phasing/swing space**
8. **Prepare required lease AQP**
9. **Incorporate phasing/swing costs into FS and project budget**
10. **Update FS estimates during PDS for Construction Prospectus submission**
11. **Complete FS and prepare Site and Design Prospectus**
12. **Or**
13. **Compile site data and prepare Site Prospectus if D/B**

**LINKS**

- Fact Sheet on Executive Order 13006
- GSA Guidebook I – Acquisition of Real Property
- GSA Guidebook II – Relocation of Residents and Businesses
- PBS Pricing Desk Guide
- Planning 2.0.0.0.0.0.a
- Site Acquisition 4.0.0.0.0.0.a

**This page applies to:**

- Traditional
- D/B
- D/B-Bridging
- CMc
1.1.2.0.0 Commissioning Authority (Cx) (Overview)

**Planning**
- Project Team identifies lead on Cx task/team
- Develop preliminary Cx Plan and required budget in FS
- Cx integrated into FS and updated in PDS

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

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

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

The PPT contains WBS and detailed project tasks for Cx

Programmatic discussion may be found in the Building Cx Guide
1.0.0.0.0 Project Management Documents

Construction Manager as Constructor

1.1.0.0.0.b Project Management Plan (PMP)

PM defines project delivery method and procurement strategies

- PM coordinates PMP development with Project Team
- Draft PMP submitted with Site and Design Prospectus
- PM publishes PMP, updates as appropriate, and uses as communication tool for team and clients
- PM leads review and update of PMP, including approvals
- Confirm customer expectations, including OA reviews/updates

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

LINKS

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

This page applies to:

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

GSA - Public Buildings Service

1.1.0.0.0.b

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

Project Team selects delivery method.

Project Team discusses procurement strategies based on selected delivery method.

CO prepares draft AQP for inclusion in draft PMP.

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

LINKS

Acquisition Plan
Acquisition Plan FAR Part 7
DEP&P

PMP/Acquisition Plan Outline Combined
Sample SSP

This page applies to:

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

GSA - Public Buildings Service
1.1.1.0.0.0.c

Planning Page 31
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>A/E Source Selection</td>
<td>A/E</td>
</tr>
<tr>
<td>6.2.0.0.0.0</td>
<td>General Contractor 6.10.0.0.0</td>
</tr>
<tr>
<td>GC should be on board during Concept development by A/E for maximum benefit to GSA</td>
<td></td>
</tr>
<tr>
<td>Project Team will determine if SS will be Two-Stage, Two-Stage Plus Design Charrette or Three-Stage with a Design Competition</td>
<td></td>
</tr>
<tr>
<td>The CMs shall be on contract concurrently with the Design A/E to maximize their input in the early stages of design</td>
<td></td>
</tr>
<tr>
<td>The professional services obtained through these contracts are required to insure quality, constructability and to manage budget, scope and schedule</td>
<td></td>
</tr>
<tr>
<td>Project Team must determine when the CMc contract is awarded. To achieve maximum benefits of their expertise, the CMc should be hired concurrently with the A/E.</td>
<td></td>
</tr>
<tr>
<td>Project Team will determine when to bring the D/B-BCC and their A/E on board to maximize bridging benefits from Design A/E to D/B A/E.</td>
<td></td>
</tr>
<tr>
<td>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.</td>
<td></td>
</tr>
<tr>
<td>The D/B portion of this procurement will require extensive preparation of the D/B RFPs.</td>
<td></td>
</tr>
<tr>
<td>The level of services provided by each contractor will be determined by the Project Team as they refine the pertinent SOWs</td>
<td></td>
</tr>
</tbody>
</table>
REQUIRED PROFESSIONAL SERVICES FOR CAPITAL CONSTRUCTION PROJECTS:

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

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

**Art-in-Architecture (AiA)**
- Design Task Order concurrent with A/E NTP 6.1.0.0.0.0.b
  - The process is outlined in the Guide for AiA OCA Program managers are available on this sensitive program.
- A/E Concept Design 6.7.14.0.1.0
- A/E Fabrication Task Order 7.1.4.0.0.0
- A/E Deliverable 7.1.12.0.0.0

**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.

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

CxA
- 6.3.1.0.0.0.b

AIA
- 6.1.0.0.0.0.b

CMc
- Construction Contractor
- Design Services
- Construction
- Start-up/Turnover
- 6.10.0.0.0.0

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
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
Project Management Documents
Construction Manager as Constructor

1.0.0.0.0 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

1.1.3.2.0.0 Project Updates in PIP

This page applies to:

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

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

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

Regions formally appoint PM (if not previously appointed)

PMs invited to workshops sponsored by the OCA

Present PMP to OCA representatives and GSA peers (PMs)

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

PMs update PMP as needed

PM assembles Project Team (Transition is made from ABT)
2.0.0.0.0 Planning
Construction Manager as Constructor
2.5.0.0.0 Program Development Study (PDS)

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

Does timing allow use of DE A/E?

Yes

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

No

Use Project Consultant Task Order 6.1.0.0.0.a

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

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

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

LINKS

Project Planning Guide (PPG) Project Coordination 1.1.0.0.0.a
Pre-Project (Preliminary) Planning 2.1.0.0.0.1 Feasibility 2.4.1.0.0.0.a

This page applies to:
☑ Traditional ☑ D/B ☑ D/B-Bridging ☑ CMc
3.0.0.0.0 Authorization/Funding
Construction Manager as Constructor

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

Not approved

OMB passback

Approved

Project to be resubmitted in future FY

This page applies to:

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

GSA - Public Buildings Service 3.4.0.0.0 Planning Page 41
Procurements proceed based on the strategies in the PMP and IAW with funding guidance and the Site/Design Directives letter.
Site Selection includes complex compliance issues to include but not be limited to EO's, 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.

**Design documents reflect mitigating measures for NHPA or NEPA as appropriate**

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

**LINKS**
- DEP&P
- PBS-P100
- Fact Sheet on Executive Order 13006
- Pre-Project (Preliminary) Planning 2.1.0.0.0.1
- Relocation Planning 2.6.0.0.0.0
6.0.0.0.0 Design
Construction Manager as Constructor
4.2.0.0.0 Site Acquisition (Overview)

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

Construction Award cannot occur without clear title to site

Site Selection Team completes formal Site Selection Process

Determine DA and advertise for sites

Evaluate sites

Select top 3 sites

Announce site selected

Make site offers

Clear title

Site Selection Process

NHPA/NEPA

Are there site concerns?

Yes

No

Conduct ESA Phase 2 sampling

Complete NEPA and NHPA

Is this ROD or FONSI?

ROD

FONSI

Develop costs to clean property

Incorporate mitigation into design documents

Acquire site

ESAs completed

Contract for appraisal

Review draft appraisal

Complete survey

Review and approve final appraisal

Deduct cost to clean property

Determine final property valuation

Appraisal and GeoTech Studies

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

LINKS

GSA Guidebook I – Acquisition of Real Property
Relocation Planning 2.6.0.0.0

This page applies to:

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

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

6.2.1.0.0.0.a

Prepare Source Selection Plan

6.4.2.0.0.0

Issue RFQ

Complete Contract Evaluation

Use Project Consultant Task Order

6.1.0.0.0.0.a

LINKS

This page applies to:

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

GSA - Public Buildings Service

6.2.0.0.0

Design Page 4
6.2.1.0.0.0 A/E Services Scope of Work (Overview)

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
3.0.0.0.0.0 Authorization/Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design/Build
6.0.0.0.0.0 Design
6.2.1.0.0.0.0 A/E Services Scope of Work (Overview)
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy

**Process Flow Diagram**

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

**Links**

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

**This page applies to:**

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

**Source Selection Plan 6.4.2.0.0.0**
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.

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.

Coordinate with CO, OCA and Legal

SSA approves the SSP

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

A/E Evaluation Board develops Selection Criteria and Evaluation Methodology

SSA appoints A/E Evaluation Board with OCA approval

Project Team commences DE procedures for A/E selection process

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

Two-Stage Selection

Project Team implements A/E SS Strategy approved in PMP

OCA issues Site/Design Directives

GSA - Public Buildings Service
This page applies to:

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

6.0.0.0.0 Design

Construction Manager as Constructor

6.2.1.0.0.0.b Design Charrette (Optional)

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

<table>
<thead>
<tr>
<th>Phase</th>
<th>Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>I</td>
<td>35% - Design Firm - past performance</td>
</tr>
<tr>
<td></td>
<td>25% - Lead Designer’s philosophy and design layout</td>
</tr>
<tr>
<td></td>
<td>25% - Lead Designer’s portfolio</td>
</tr>
<tr>
<td>II</td>
<td>15% - Lead Designer’s profile</td>
</tr>
<tr>
<td></td>
<td>50% - Team design performance</td>
</tr>
<tr>
<td></td>
<td>30% - Team organization and management</td>
</tr>
<tr>
<td></td>
<td>15% - Professional qualifications</td>
</tr>
<tr>
<td></td>
<td>5% - Geographic location</td>
</tr>
</tbody>
</table>

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

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

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

Construction Manager as Constructor

6.2.1.0.0.0 Design Competition

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
6.2.1.0.0.0.c Design Competition
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy

Project Team conducts a Design Competition IAW DEP&P

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

Coordinate Planning with OCA and Competition Advisor and Hold Vision Competition

Blind Evaluation of Vision Competition by Independent Jury of National Peers

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

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

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

Final Selection by the GSA Regional Selection Authority

LINKS

DEP&P

This page applies to:

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

A/E Source Selection 6.2.2.0.0.0

GSA - Public Buildings Service 6.2.1.0.0.0.c Design Page 8
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 A/E Source Selection/Evaluation Process
6.2.5.0.0.0
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy

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

 LINKS
A/E Advertisement A/E Evaluation Board Report
Acquisition Plan DEP&P FAR
GSAM Notification Letters to A/E Firms
PMP Reference Sample SSP A/E Procurement (Overview) 6.2.0.0.0.0

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

Project Team receives approved SSP and commences A/E selection

Prepare and clear CBD and design magazine announcements with approval by region/OCA 6.2.2.0.0.0

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

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

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

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

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

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

Schedule Interviews with short-listed A/Es

Receive Phase II submissions

Advertise for Design Architect – Bridging Design Services

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

Yes

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

A/E Contract for Design 6.2.6.0.0.0
6.0.0.0.0 Design
Construction Manager as Constructor

6.2.6.0.0.0 A/E Contract for Design

- GSA Project Team meets with A/E to review project goals and objectives
- Meet with A/E to review SOW
- Revise SOW
- Update government fee estimate
- Request proposal
- Receive and review proposal
- Prepare technical evaluation including PNP
- PM/CO conduct negotiation with A/E
- Prepare PNM
- Finalize contract, including SOW, clauses, schedule, etc.
- Award A/E contract and compile contract file

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

If GSA cannot reach agreement on SOW and/or A/E fees with the #1 firm, GSA may terminate negotiations. GSA may then open negotiations with the #2 firm.
6.0.0.0.0 Design
Construction Manager as Constructor
6.3.1.0.0.0.a CMa Scope of Work

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

Construction Manager as Constructor

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

---

**Project Team** reviews PMP strategy and required Cx services

**Project Team confirms** project goals and objectives with all stakeholders

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

---

**Finalize SOW**

---

**The Project Team** evolves over the life of the project. As contractors (A/E, CMA, CMc, Cx, GC/CC) and special consultants are hired, they become a part of the Project Team.
CMa SOW 6.3.1.0.0.a

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

6.0.0.0.0.0 Design
Construction Manager as Constructor
6.3.2.0.0.0 CMa Task Order/CxA Task Order

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

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

**LINKS**

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

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

GSA - Public Buildings Service 6.3.2.0.0.0 Design Page 13
7.0.0.0.0 Construction
Construction Manager as Constructor

- Construction Procurement (GC/CC) 6.10.1.0.0.0
- (0% to 100% Construction) 7.1.0.0.0.0
- Closeout (Admin) 7.2.0.0.0.0

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

6.10.1.0.0 GC/CC Source Selection Plan

- Project Team reviews AQP and PMP
- Establish SSEB
- Develop SSP Criteria
- GC/CC Evaluation Factors (Phase I) 6.10.1.0.0
- GC/CC Evaluation Factors (Phase II) 6.10.13.0.0
- Draft SSP
- SSEB reviews and SSA approves SSP
- Revise and resubmit
- Is it approved?
  - Yes
    - Issue SSP
  - No

Prepares/updates AQP as needed

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

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
8.0.0.0.0 Tenant Occupancy

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

Links

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

This page applies to:

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

GSA - Public Buildings Service 6.10.1.0.0 Design Page 17
Construction Manager as Constructor

6.10.2.0.0 Advertisement for Construction Services

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

---

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
7.0.0.0.0 Construction
Construction Manager as Constructor
6.10.4.0.0.0 Pre-Proposal Conference

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

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

Concurrent Activities

Proceed with Proposal Document Addenda 6.10.11.0.0.0

No

LINKS

- FAR
- GSAM
- Sample Agenda
- GC/CC Source Selection Plan 6.10.1.0.0.0

This page applies to:

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

GSA - Public Buildings Service
6.10.4.0.0.0
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

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

LINKS

FAR GSAM

7.0.0.0.0 Construction
Construction Manager as Constructor
6.10.11.0.0.0 Proposal Document Addenda

GSA - Public Buildings Service 6.10.11.0.0.0 Design Page 20
6.10.1.0.0 GC/CC Selection Evaluation Factors (Phase I)

6.10.8.0.0.0 GC/CC Evaluations/Selection (Phase I)

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.
6.10.13.0.0 GC/CC Evaluations/Selection (Phase II)

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?

Develop negotiation strategy

Implement strategy

Offerors within the competitive range submit BAFO

Update OA prior to award 8.1.1.3.0.0

Notify offerors
7.0.0.0.0.0 Construction Manager as Constructor

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

---

**This page applies to:**

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

---

Project Team requests allowance from OCA/PBS Budget Office

Update OA 8.1.1.3.0.0

CO issues award and publishes award announcement

Initiate security clearance process of contractor personnel

Request bonds and insurance

Receive, review, and approve

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.
6.0.0.0.0 Design
Construction Manager as Constructor
6.7.0.0.0 Concept Design (Overview)

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

Some processes may be concurrent
1.0.0.0.0 Project Management Documents
2.0.0.0.0 Planning
3.0.0.0.0 Authorization/Funding
4.0.0.0.0 Site Acquisition
5.0.0.0.0 Design/Build
6.0.0.0.0 Design

6.7.0.0.0.1.a Concept Design

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LINKS
- A/E SOW
- Acquisition Plan
- AiA
- DEP&P
- Design Review Checklist
- PDRI
- PMP Reference
- VE Guide

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

**6.0.0.0.0 Design**

**Construction Manager as Constructor**

6.7.0.0.0.1.a Concept Design

---

Review PMP

Acceptable?

Yes

Conduct
Programming or
Validation/Program Review

No

Acceptable?

Yes

Conduct Partnering Workshop/Kick-off

6.7.2.0.0.0

Team may elect to provide some of these services by the CMa

Design Charrette Documents

6.7.4.0.0.0

A/E prepares interim submissions

Prepare interim submission(s)

No

Acceptable?

Yes

Conduct on-board interviews

Verify budget compliance by performing IGE

Prepare three preliminary concepts

Give presentation(s)

Preferred: incorporate AIA Concept Proposal

6.7.14.0.1.0

Review of preliminary concept and estimated cost by team, client, peers

Acceptable?

Yes

Design Excellence Peer Review

6.7.7.0.0.0

No

A/E develops final concept

Concept VE workshop

6.7.6.3.0.0

---

GSA - Public Buildings Service

6.7.0.0.0.1.a Design Page 25
A/E incorporates VE, develops final presentation

Conduct regional presentation

Concept Design Review Comments

Prepare final concept submission

Submit for OCA IGE

Review final concept submission

A/E incorporates review comments

Conduct presentation to Commissioner

OCA prepares Commissioner’s final concept approval memorandum

Issue NTP for DD phase

Validate funding sources

Verify budget compliance by performing IGE

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

The OCA review is concurrent with the final concept review

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.
6.7.2.0.0 Concept Design Partnering Workshop

Pre-planning

Pre-plan

Setup

Setup

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

Partnering workshop

Partnering workshop

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.

Charter

Charter

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

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

Establish lines of communication and roles and responsibilities

This page applies to:

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

LINKS

Design Excellence Peer Review 6.7.0.0.0

Final Concept Presentation to the Commissioner 6.7.14.0.0.0

GSA - Public Buildings Service

6.7.2.0.0.0 Design

Construction Manager as Constructor

6.7.2.0.0 Concept Design Partnering Workshop

Design Charrette Documents 6.7.4.0.0
Design Charrette Documents

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

Project Team will determine the type and level of effort required of the A/E in Concept Design. Refer to the PMP for project needs. 1.1.0.0.0.b

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

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

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

OCA is available to assist. Contact the Program Coordinator to provide technical assistance, programmatic specialists, etc.
At least three distinctly different concepts will be submitted by the A/E team.

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

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

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

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

OCA will recommend the final concept.

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

Potential for multiple peer reviews.

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

Links:
- A/E SOW
- 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

6.7.6.3.0.0 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.

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**LINKS**

GSA Guidebook I – Acquisition of Real Property

GSA Guidebook II – Relocation of Residents and Businesses

NEPA  
NHPA  
PBS-P100

Project Planning Guide

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

---

**Final Concept Presentation to Commissioner**  
**6.7.14.0.0.0**
6.0.0.0.0 Design

Construction Manager as Constructor

6.7.14.0.0 Final Concept Presentation to the Commissioner

6.7.15.0.0.0 Final Concept Approval Memorandum

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning Authorization/Funding
4.0.0.0.0.0 Site Acquisition Design/Build Design
6.0.0.0.0.0 Final

6.7.14.0.0.0 Concept Presentation to the Commissioner
6.7.15.0.0.0 Final Concept Approval Memorandum

7.0.0.0.0.0 Construction Tenant Occupancy

Concept Review Comments (Urban Design Review Board) 6.7.12.2.0.0

LINKS

PBS-P100 Concept Design Partnering Workshop 6.7.2.0.0.0

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

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

Preferred: include the presentation of the AIA 6.7.14.0.1.0

OCA issues Task Order for IGE

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

OCA will review and comment within 10 working days

Reconciliation of IGE and A/E estimate

Is project within budget?

Yes

Schedule presentation to Commissioner

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.

Coordinate meeting logistics

A/E and PM conduct presentation

OCA prepares Commissioner final concept approval memorandum

Issue NTP for DD phase

Redesign to budget

Concept Design (Overview) 6.7.0.0.0.0

Design Development (Overview) 6.8.0.0.0.0
6.0.0.0.0 Design
Construction Manager as Constructor

6.7.14.0.1.0 Art-in-Architecture Concept Design

1.0.0.0.0 Project Management Documents
2.0.0.0.0 Planning
3.0.0.0.0 Authorization/Funding
4.0.0.0.0 Site Acquisition
5.0.0.0.0 Design/Build
6.0.0.0.0 Design 6.7.14.0.1.0 Art-in-Architecture Concept Design
7.0.0.0.0 Construction
8.0.0.0.0 Tenant Occupancy

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**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?**

- No
  - Peer review may occur in this step
  - **RA recommends approval of concept to OCA and Commissioner**

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

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**Links**

- Concept Design Partnering Workshop 6.7.2.0.0.0

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**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)

Design Development Process 6.8.0.0.0.1

Utility Rebate Program Review 6.8.0.0.0.2

DD Program Review Workshop 6.8.1.0.0.0

DD Systems Selection Analyses 6.8.2.0.0.0

DD Interdisciplinary Coordination Review

National CAD/CIFM Standards Compliance Review

DD Submission (35%) 6.8.5.0.0.0

Construction Strategy/Phasing Plan 6.8.9.0.0.0

Independent OCA PBS-P100 Review and Estimate 6.8.11.0.0.0

This page applies to:

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

Construction Manager as Constructor

6.8.0.0.0.1 Design Development (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

6.8.0.0.0.1 Design Development (Process)

7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy

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**LINKS**

- National CAD/ CIFM Standards
- OA Tool
- PBS-P100
- PDRI
- Concept Design (Overview) 6.7.0.0.0.0

**This page applies to:**

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

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**Utility Rebate Program Review 6.8.0.0.0.2**

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**Design Page 35**
Project Team should coordinate with Regional Energy Advocates and/or Energy Center of Expertise for current program guidance.

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

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

Based on the data compiled, the Project Team will be better positioned to make informed business decisions early in DD.
Project Team should review PMP, Cx Plan and status of current programming. PMP strategy may indicate a need for the DD Workshop if certain program parameters are evident. **1.1.1.0.0.b**

**Is a workshop needed?**

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

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

---

Verifying 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.
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

6.0.0.0.0 Design

Construction Manager as Constructor

6.8.2.0.0.0 DD Systems Selection Analyses

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

6.8.2.0.0.0 DD Systems Selection Analyses

7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy

LINKS

HVAC Excellence PBS-P100 PMP Reference

This page applies to:

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

GSA - Public Buildings Service 6.8.2.0.0.0 Design Page 38
**Design**

**Construction Manager as Constructor**

**6.8.5.0.0 DD Submission (35%)**

---

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

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

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

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

---

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

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

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**This page applies to:**

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

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GSA - Public Buildings Service 6.8.5.0.0.0 Design Page 39
Does the construction strategy still make good business sense?

No

Project Team will need to revisit their construction strategy. A brainstorming session with the Project Team, including A/E, CMa, and several COs may be necessary to develop a new procurement strategy.

Yes

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

The CO will revise the AQP and obtain the necessary approvals

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

LINKS

PBS-P100

PMP 1.1.1.0.0.0.b

This page applies to:

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

6.0.0.0.0 Design

Construction Manager as Constructor

6.8.9.0.0.0 Construction Strategy/Phasing Plan

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

Thi page applies to:

Traditional ❑ D/B ❑ D/B-Bridging ❑ CMc
6.0.0.0.0 Design
Construction Manager as Constructor
6.8.11.0.0.0 Independent OCA PBS-P100 Review and IGE

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

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

OCA will review and comment within 10 working days

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

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

LINdS

PBS-P100

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

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

Verify budget compliance by performing IGE

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

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

Note: Team may elect to provide some of these services by the CMA or CMC

Verify Shell and T.I., Validate Funding Sources

Independent verification of review comments

CMa/CMc Update Estimate 6.7.12.0.0.0

Prepare PBS CAD Library Submission

OCA performs independent review and optional estimate 6.7.13.0.0.0

Coordinate with A/A Fabrication and Installation 7.1.4.0.0.0

Finalize/issue construction bid documents

OA Update 8.1.1.3.0.0

Verify budget compliance by performing IGE

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

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

Note: Team may elect to provide some of these services by the CMA or CMC

Verify Shell and T.I., Validate Funding Sources
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%)

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning Funding
3.0.0.0.0.0 Authorization/ Acquisition
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design
6.0.0.0.0.0 Design
6.9.3.0.0.0 CD Program Review Workshop
6.9.10.0.0.0 CD Program Review Workshop (90%)
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy

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

Similar to Concept Program Review

Project Team determines the need for CD Program Review Workshop

Yes

Review PMP 1.1.1.0.0.0

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

Is the program within scope and budget?

No

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

Yes

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

Review and update Cx Plan as needed

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

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

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

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

CMa conducts review and IGE

Project Team reviews submission and prepares comments

Is the program within scope and budget?

Yes

Update OAs as needed 8.1.1.3.0.0

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

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

LINKS

PBS-P100 PMP Reference
Professional Services Estimating Tool

This page applies to:

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

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

GSA - Public Buildings Service

6.9.3.0.0.0

Design Page 43
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)

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

7.0.0.0.0 Construction
8.0.0.0.0 Tenant Occupancy

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

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

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

Is the program within scope and budget?

Yes

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

OCA completes IGE to insure project is within budget

Yes

Will OCA order IGE?

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

No

OCA completes compliance review, scope review and IGE

Is the program within scope and budget?

Yes

OCA provides feedback to regions for the 100% CD submission

No

Update OAs as needed 8.1.1.3.0.0

LINKS

PBS-P100 PMP Reference

Professional Services Estimating Tool

This page applies to:

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

CMA’s CD Review/Estimate (100% CDs) 6.7.12.0.0.0
6.0.0.0.0 Design

Construction Manager as Constructor

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

CMa and Project Team reconcile scope or costs as needed

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

A/E updates checklists as needed

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

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

Is the program within scope and budget?

Yes

Update OAs as needed 8.1.1.3.0.0

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

Construction Officer will proceed with Construction Procurement when funds are authorized

No

CXA review as specified in Cx Plan

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

This page applies to:

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

GSA - Public Buildings Service

6.7.12.0.0.0

Design Page 45
7.0.0.0.0.0 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 reviews PMP and AQP to confirm strategy and timing for NTP
    - No: Redesign or commence SS for new GC/CC

- 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

  - Initiate security clearance process for CC personnel
  - CO requests bonds and insurance

  - Project Team receives, reviews, and approves submittals

  - Project Team reviews PMP and AQP to confirm strategy and timing for NTP

  - CO prepares to issue NTP

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

- NTP 7.1.0.0.0

**Links**

- Acquisition Plan
- PMP Reference

**This page applies to:**

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

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

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

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

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

---

**LINKS**

- AiA Contract 6.1.0.0.0.b

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**This page applies to:**

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

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**GSA - Public Buildings Service**

**7.1.4.0.0.0**

**Construction Page 3**
7.0.0.0.0 Construction
Construction Manager as Constructor

7.1.1.0.0.0 Notice To Proceed

CO issues NTP

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

Include partnering and construction kick-off information in NTP letter

Determine best option

Concurrent Meetings

Conduct Construction Kick-off Meeting 7.1.2.0.0.0

Conduct Partnering Session 7.1.3.0.0.0.a

Conduct Construction Kick-off Meeting 7.1.2.0.0.0

Conduct Partnering Session 7.1.3.0.0.0.a

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

(links)

Sample NTP Letter

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

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

- Project Team determines location, date, and time of meeting
- Invite stakeholders
- Project Team develops agenda
- Conduct meeting
- CMa issues meeting minutes

Discuss Pros/Cons of Concurrent Kick-off and Partnering Meetings 7.1.3.0.0.0.a

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

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

LINKS

Sample Kick-off Meeting Agenda
Suggested Stakeholders Invitation List

PMP 1.1.1.0.0.0.b

This page applies to:
✓ Traditional  ✓ D/B  ✓ D/B-Bridging  ✓ CMc
7.0.0.0.0.0 Construction
Construction Manager as Constructor
7.1.3.0.0.0.a Partnering Session

Project Team discusses upcoming partnering session

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

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

Selection process: consultant or in-house?

Consultant

Issue a task order for 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

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.

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
1.0.0.0.0 Project Management Documents
2.0.0.0.0 Planning
3.0.0.0.0 Authorization/ Funding
4.0.0.0.0 Site Acquisition
5.0.0.0.0 Design/Build
6.0.0.0.0 Design
7.0.0.0.0 Construction
7.1.3.0.0.0.b Partnering Session

Session: Timing Benefits and Drawbacks

8.0.0.0.0 Tenant Occupancy

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**7.0.0.0.0.0 Construction**
**Construction Manager as Constructor**

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

---

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

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

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

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

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

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

---

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

Construction Manager as Constructor

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

- **Project Team reviews and approves construction schedules**
  - 7.1.6.2.0.0

- **GC/CC prepares submittal schedule, Log and Submissions**
  - 7.1.6.4.0.0

- **GC/CC coordinates testing schedule law contract**
  - 7.1.6.5.0.0

- **CMa prepares and monitors QA Plan**
  - 7.1.2.0.1.2

- **CMa/CxA conducts or prepares inspection schedule/reports**
  - 7.1.6.5.0.0

- **PM/CO coordinate and manage contract modifications**
  - 7.1.6.8.0.0

- **CMa prepares special testing/mockup plans/reports**

- **Project Team establishes system and monitors RFIs**
  - 7.1.6.0.0.1.c

- **CO processes progress payments law contract specifications and approved schedule**

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

- **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.
Construction Manager as Constructor

7.1.6.0.0.1.a Construction Administration: Safety

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

Project Team reviews project-specific Safety Management Plan

Accept plan? Yes

Project Team implements and monitors safety plan

Project Team receives reports

No

Provide feedback to contractor
7.0.0.0.0.0 Construction
Construction Manager as Constructor

7.1.6.0.0.0.1.b Construction Administration:
Project Cost Management

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

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

7.1.6.0.0.1.b Construction Administration:
Project Cost Management

8.0.0.0.0.0 Tenant Occupancy

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

GSA - Public Buildings Service 7.1.6.0.0.1.b Construction Page 13
7.1.6.0.0.1.c Requests for Information (RFI)

1. Project Team develops process to manage RFIs

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

3. CMa prepares log and tracks the RFI

4. Responsible party reviews and responds

5. Respond to contractor

6. Contractor reviews response

7. Determine if response is a change order

8. GC/CC Contract Modifications 7.1.6.8.0.0

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

10. GC/CC implements response

---

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

7.1.6.2.0.0 Construction Schedules

GC/CC contractor submits preliminary CPM schedule

Provide feedback to GC/CC

Review schedule

Is preliminary schedule accepted?

Yes

No

GC/CC submits baseline schedule

Provide contractor feedback

Project Team reviews baseline schedule

Is baseline schedule approved?

Yes

No

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

Cost loaded schedule must be approved as provided in CPM examples

PM/CO will note any special provisions for off-site stored materials

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

LINKS

CPM Examples

Project Updates in PIP 1.1.3.2.0.0

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc
7.1.6.4.0.0 Submittal Schedule/Log/Submissions

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

GC/CC contractor
prepares and delivers
submittal schedule

Is submittal
schedule accepted?

Yes

Project Team establishes
process to track submittals

No

Provide feedback
to contractor

Review submittal schedule

Schedule reviewed by A/E,
GSA, and CMa

Refer to specifications for
submission requirements

Manage and update
submittal log via monthly/
weekly scheduled
meetings

Typically managed by CMa

7.0.0.0.0.0 Construction
Construction Manager as Constructor

This page applies to:

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

LINKS

Sample Submittal Schedule

GSABuildings Service
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 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

Provide feedback to GC/CC

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

(OCA development December 2004)
Do specifications require GC/CC or GSA testing?

GC/CC coordinates testing schedule

GC/CC/CC coordinates testing schedule with CMa and tenants

GSA coordinates testing schedule with CMa and tenants

Provide feedback to contractor; GC/CC correct deficiencies

Conduct test

GC/CC submits results reports to CMa

Project Team submits results reports to contractor

Periodically check tests to make sure there are no abnormalities

Yes

Pass?

Evaluate results

Proceed and file report

Accept?

No

No
GC/CC identifies special testing/mockup plans/reports

Project Team reviews contractor's mockup testing/inspection schedule

Contractor constructs mockup

Contractor conducts test/inspection

Contractor submits results/reports to GSA/CMa

Refer to project specifications for requirements

Provide feedback to contractor

Pass?

Proceed and document

Evaluate results

Accept?

Yes

No

Yes

No
Will project use Web-cam?

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

No: Don't install.

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

Coordinate security.

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

Implement. (Typically managed by CMa.)
Requests for contract modifications are typically generated from three sources:

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

Contingency funds may be used only for errors or omissions.

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

Verify funding source and availability.

Develop IGE

Analyze schedule fragment

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

Is the request valid?

Yes

Obtain necessary funding documents

Issue RFP

GC/CC responds to RFP

CMa analyzes request proposal

Negotiate

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

No

Deny request
Evaluations of contractor past performance are required under FAR

Past performance evaluations are a part of future procurement evaluations criteria

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

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

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

The PM and CO typically complete the evaluations

Go to the NIH Website and complete the evaluation form

If circumstances indicate a change in the frequency of the evaluations, the Project Team may make changes as deemed appropriate
The Project Team evolves over the life of the project. As contractors (A/E, CMA, CMc, Cx, GC/CC) and special consultants are hired, they become a part of the Project Team.

Project Team discusses need for a follow-up Partnering Session

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

Is follow-up Partnering Session needed?

Yes

No

No further action required

Plan Partnering Session

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

Selection Process: consultant or in-house?

Consultant

In-house Facilitator

Issue a Task Order for Project Consultant 6.1.0.0.0.0.a

or

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
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
**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
  - 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
  - No peer review necessary

Project Team coordinates with OCA

---

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

---

** Links **

- 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
7.0.0.0.0 Construction

Construction Manager as Constructor

7.1.13.0.0.0 Additional Phases Delivery (TI, Phases, Annexes)

---

**Diagram Description:**

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

---

**This page applies to:**

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

---

GSA - Public Buildings Service

7.1.13.0.0.0

Construction Page 27
7.0.0.0.0 Construction
Construction Manager as Constructor
7.1.14.0.0.0 Turnover Documents

Project Team receives turnover documents

- O&M Manuals Submittal 7.1.14.3.0.0
- Warranties and Certifications 7.1.14.4.0.0
- Material Samples, Attic Stock and Spare Parts 7.1.14.6.0.0
- Contractor Record Drawings 7.1.14.7.0.0

Review and accept turnover documents

LINKS

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

This page applies to:

- Traditional
- D/B
- D/B-Bridging
- CMc
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 7.1.14.5.0.0

   - Fail
     - Withhold percentage of payment

LINKS

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

This page applies to:

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

Determine requirements for start date of warranties and certifications

Identify who will prepare and receive warranties and certifications

Prepare warranties and certifications

Submit warranties and certifications

Review warranties and certifications and report status to Project Team

Project Team reviews and comments

Pass or Fail?

Withhold percentage of payment

Pass

Contract Record Drawings
7.1.14.7.0.0
7.0.0.0.0 Construction
Construction Manager as Constructor

7.1.14.6.0.0 Material Samples, Attic Stock and Spare Parts

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

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

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

Submit material samples, attic stock and spare parts

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

Project Team reviews and comments

Pass?

Withhold percentage of payment

Yes

Complete

No

Property Manager is key player

7.1.14.6.0.0 Material

Samples, Attic Stock and Spare Parts

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

LINKS

PMP Reference

This page applies to:

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

GSA - Public Buildings Service 7.1.14.6.0.0 Construction Page 31
Using PMP, CMa/CxA establishes list of contractor record drawings required

Determine requirements for contractor record drawings

Identify who will receive and secure contractor record drawings

Submit contractor record drawings

Verify correct documentation/as-builts of contractor record drawings

Project Team reviews and comments

Pass?

No

Withhold percentage of payment

Yes

A/E or Contractor?

Contractor

A/E

Prepare record documents from contractor redlines 7.2.1.0.0.0

Complete and distribute as directed by Project Team

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
**7.0.0.0.0 Construction**

**Construction Manager as Constructor**

**7.1.14.2.0.0 Systems Start-Up and Testing (Commissioning)**

**Use O&M Manuals**

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

7.1.14.2.0.0 Systems Start-Up and Testing (Commissioning)

8.0.0.0.0.0 Tenant Occupancy

**LINKS**

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

**This page applies to:**

- Traditional
- D/B
- D/B-Bridging
- CMb

**7.1.14.2.0.0 Systems Start-Up and Testing (Commissioning)**

- CMa/CxA performs the following duties as directed by the Project Team
- CMA SOW – 6.3.1.0.0.0.a
- CxA SOW (if apart from CMa) – 6.3.1.0.0.0.b

- 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

- Yes

- No

- Pass?

- Substantial Completion Certification 7.1.15.0.0.0.a

- Property Management Training 7.1.14.5.0.0

GSA - Public Buildings Service 7.1.14.2.0.0 Construction Page 33
CMa/CxA performs the duties as directed by the Project Team (PMP)

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

Develop format for training (digital, online, video)

Identify who will receive training

Schedule training and coordinate with Project Team

Perform training

Project Team reviews and comments

Pass?

No

Withhold percentage of payment

Yes

Complete

Document the training in digital format and save to the EMS

This page applies to:

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

7.1.15.0.0.0.a Substantial Completion Certification

LINKS

O&M Manuals
Submittals
7.1.14.3.0.0

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

GSA - Public Buildings Service

7.1.15.0.0.0.a

Construction Page 35
Construction Manager as Constructor

7.1.15.0.0.0.b Substantial Completion Certificate: Final Cleaning

- Punch Lists 7.1.14.1.0.0.b
- Establish schedule for final cleaning
- Clean according to cleaning specifications in contract
- Pass?
  - Yes
    - Closeout (Admin) 7.2.0.0.0.0
  - No
    - Make sure retention is held for final cleaning

LINKS

- 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
7.1.14.1.0.0.a Final Inspections

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

Initiate Punch 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

7.1.14.1.0.0.a

GSA - Public Buildings Service

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

No

Other forces correct?

Yes
**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**
- Project Management Documents

**2.0.0.0.0**
- Planning
- Authorization/Funding

**4.0.0.0.0**
- Site Acquisition

**5.0.0.0.0**
- Design/Build

**6.0.0.0.0**
- Design

**7.0.0.0.0**
- Construction

**7.1.15.0.0.0.c Substantial Completion Certificate: Final Completion**

**8.0.0.0.0**
- 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

---

GSA - Public Buildings Service 7.1.15.0.0.0.c Construction Page 40
7.0.0.0.0 Construction
Construction Manager as Constructor
7.2.0.0.0 Closeout (Admin)

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

Some processes may be concurrent.

Project Team must ensure all punch list items are completed, all contractor cleaning is completed, system testing is completed, and staff training has been conducted before proceeding to Closeout.

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

GSA - Public Buildings Service 7.2.0.0.0

Construction Page 41
**Construction Manager as Constructor**

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

---

**CO executes Maintenance and Cleaning Option**

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

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

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

---

**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

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

---

**This page applies to:**

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

---

**Contract Closeout (GC/CC)** 7.2.3.1.0.0

---

GSA - Public Buildings Service 8.3.4.0.1.2 Construction Page 42
Closeout (Admin)

7.0.0.0.0 Construction

Construction Manager as Constructor

7.2.1.0.0.0 A/E Record Documents

- CMa verify redlines are up to date
- Exercise GC/CC option or amend A/E contract for record documents
- Receive as-built documents from GC/CC
- A/E prepares record documents from as-built drawings/documents
- Ensure PBS CAD standards are enforced 7.2.2.0.0.0
- A/E submits record documents to appropriate parties (regional CIO, tenants, field office)
- Pay A/E (or GC/CC) and close out contract

Closout (Admin)

7.2.0.0.0.0

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

LINKS

- Cx Plan
- QAQC Plan
- Program Development Study 2.5.0.0.0.0
- A/E Contract for Design 6.2.6.0.0.0
- Construction Administration 7.1.6.0.0.0.a
- Contractor Record Drawings 7.1.14.7.0.0
- Contract Closeout (GC/CC) 7.2.3.1.0.0
9.0.0.0.0 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

This page applies to:

☑ Traditional ☑ D/B ☑ D/B-Bridging ☑ CMc
### 7.0.0.0.0 Construction

**Construction Manager as Constructor**

#### 7.2.4.0.0.0 Dedication Ceremony Documents

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

- **Pay invoices and release claims**
  - Tear down facility
  - Write purchase orders for procured items
  - Set up facility
  - Procure mementos
  - Obtain religious figures for invocation and benediction
  - Obtain a band
  - Print and mail invitations
  - Develop program
  - Identify source of funding for refreshments
  - Identify sound and lighting system and procure

- **Project CO** typically manages these actions with PM CO.

---

**This page applies to:**

- Traditional
- D/B
- D/B-Bridging
- CMc
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
- EnergyStar
- AiA
- PM
- GSA Design Awards (Biennial)

Cx Plan/Report

A/E

OCA

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

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

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

All claims resolved/release of claims received?

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

No → Identify scope of claim

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

LINKS

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

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

7.2.3.2.1.0 Project Management Closeout

Some of these processes/tasks are concurrent

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

- Project Team completes following tasks for PM closeout

- Develop lessons learned

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

- Closeout A/E, CMa, CxA and other consultant contracts

- Store project files; stored regionally for 2 years; archived for 7 years; disposed of accordingly

- Perform final benchmark analysis (TI and Shell)
  7.1.7.0.0.0

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

LINKS

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

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc
Project Team completes tasks for financial closeout

Close out RWAs if open

Return balance of funds to appropriate parties

Is interest due?

Yes

Pay interest

No

Retain for possible interest payments from final invoice

Close out items from GSA Financial System

Process all final payments

Pay

Project Team compiles all project cost data and completes Real Property Acquisition Advice (GSA Form 1011)
**Construction Manager as Constructor**

**8.1.3.0.1.0 Real Property Acquisition Advice (GSA Form 1011)**

1. **Project Management Documents**
2. **Planning**
3. **Authorization/Funding**
4. **Site Acquisition**
5. **Design/Build**
6. **Design**

---

**8.1.3.0.1.0 Real Property Acquisition Advice (GSA Form 1011)**

**7.0.0.0.0 Construction**

1. **Project Team evaluates GC/CC performance to date**
2. **GC/CC submits final construction option pricing**
3. **Project Team reconciles CC proposal with IGE**
4. **Are negotiations required on scope or pricing?**
   - Yes: Project Team develops negotiating strategy
   - No: Project Team requests allowance documents from OCA/PBS Budget Office

---

**Exercise GMP option for construction and publish Award Announcement**

- **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**

---

**Notice To Proceed 7.1.1.0.0**
8.0.0.0.0 Tenant Occupancy

Construction Manager as Constructor

8.0.0.0.0 Tenant Occupancy

This page applies to:

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

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)

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
8.1.0.0.0.0 Occupancy Agreements and RENT (Overview)

Begin preparation of OA

New or revised tenant space

Verify agency requirements

Initial Draft OA based on FS estimates 8.1.1.2.2.0.a

Update Draft OA based on PDS 8.1.1.3.0.0

Updated Draft OA based on Concept Design

Update Draft OA during DD 8.1.1.3.1.0

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

Update Draft OA prior to construction award 8.1.1.2.2.0.b

Final Reconcile OA 8.1.1.5.0.0

Archive as-built CAD Drawings 8.1.2.0.0.0

Initial RENT Start 8.1.3.0.0.0

Final OA 8.1.1.5.0.1

Substantial Completion Certificate 7.1.15.0.0.0.a

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

No OA required

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

This page applies to:

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

LINKS

PBS Pricing Desk Guide
Pricing Implementation for Project Management

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

Design Development (Overview) 6.8.0.0.0.0
Construction Documents 6.9.0.0.0.0

GC/CC Source Selection Plan 6.10.1.0.0.0
(0% to 100% Construction) 7.1.0.0.0.0
8.0.0.0.0.0 Tenant Occupancy
Construction Manager as Constructor

8.1.2.2.0.a Occupancy Agreement Planning Phase
(Initial Draft)

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

8.1.2.2.0.a Occupancy
Agreement
Planning
Phase
(Initial Draft)

Prepare OA using
FS estimate

 Transmit OA to
agency for review

Does agency agree?

Yes
Signed OA

No

Review requirements
used to develop cost
estimate

2.4.1.0.0.0.a

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

LINKS

PBS Pricing
Desk Guide

Pricing Implementation for
Project Management

Feasibility
2.4.1.0.0.0.a

PDS
2.5.0.0.0.0

Concept
Design
(Overview)
6.7.0.0.0.0

Design
Development
(Overview)
8.8.0.0.0.0

Construction
Documents
6.9.0.0.0.0

GC/CC Source
Selection Plan
6.10.1.0.0.0

(0% to 100% Construction)
7.1.0.0.0.0

This page applies to:

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

GSA - Public Buildings Service

Tenant Occupancy Page 3
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 2.5.0.0.0.0

LINKS

PBS Pricing Desk Guide
Pricing Implementation for Project Management

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

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

(0% to 100% Construction) 7.1.0.0.0.0

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

GSA - Public Buildings Service

Tenant Occupancy Page 4
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

[Flowchart diagram]

This page applies to:
- Traditional
- D/B
- D/B-Bridging
- CMc
8.0.0.0.0 Tenant Occupancy
Construction Manager as Constructor
8.1.1.2.2.0.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.

No

Award contract

Signed OA

Does agency agree?

Yes

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

Yes

Does agency agree?

No

Redesign or cancel project

No

Transmit to agency for review

GSA - Public Buildings Service

8.1.1.2.0.b

Tenant Occupancy Page 6
8.0.0.0.0 Tenant Occupancy

Construction Manager as Constructor

8.1.1.3.1.0 Occupancy Agreement (Accepted Draft): During Construction

1.0.0.0.0 Project Management
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

8.1.1.3.1.0 Occupancy Agreement (Accepted Draft): During Construction

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

Is additional funding required?

Yes

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

No

Proceed with construction

Revise OA

Transmit to agency for review

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

Does agency agree?

Yes

Obtain signature

No

Stop procurement of Change Order and re-evaluate; i.e., obtain RWA, negotiate with GC/CC, re-design, etc. Find alternate solution or cancel Change Order.

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-Bridging ☑ CMc

GSA - Public Buildings Service

OAs and RENT (Overview) 8.1.0.0.0.0

Tenant Occupancy Page 7
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

**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
- Are there any changes from last signed OA?
- Transmit to agency for review
- Does agency agree?
- Charge RENT pending mediation with agency on outstanding costs
- 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

**LINKS**

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

This page applies to:

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

GSA - Public Buildings Service

Tenant Occupancy Page 8
Use National CAD/CIFM Standards to finalize space assignment by ABC

Finalize project costs

Calculate RENT by ABC

Develop final OA (reconciliation)

Transmit to agency for review

Action Required

Does Agency agree?

Yes

Signed OA

Finalize OA in STAR

No

Are there any changes from final OA?

LINKS

PBS Pricing Desk Guide
Pricing Implementation for Project Management
Feasibility 2.4.1.0.0.0

PD 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

GSA - Public Buildings Service 8.1.1.5.0.0
8.0.0.0.0 Tenant Occupancy

Construction Manager as Constructor

8.1.2.0.0.0 National CAD/CIFM Standards

Project Team identifies funding source(s)

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

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

CO awards contract option or task order for delivery of drawings

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

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

Project Team reviews drawings and provides comments to contractor

Contractor incorporates comments and submits final CAD drawings to Project Team

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

LINKS

BOMA Space Measurement Standards

National CAD/CIFM Standards

PBS-P100

OAs and RENT (Overview) 8.1.0.0.0

This page applies to:

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

Final OA (Reconciliation) 8.1.1.5.0.0
8.0.0.0.0 Tenant Occupancy
Construction Manager as Constructor

8.1.3.0.0.0 Initial RENT Start

Project Team receives/prepares documents for processing RENT billing

Substantial Completion Certification 7.1.15.0.0.0.a

Final OAs 8.1.1.5.0.1

Real Property Acquisition Advice (GSA Form 1011) 8.1.3.0.1.0

Enter Shell, TI, operating and security costs into STAR

Amortize appropriate capital costs

Estimate building OT usage bills

Send notification to agencies

Tenant Move-In 8.2.6.0.0.0

Initiate RENT billing

Inform central office of initial RENT start

Update PIP for performance measure

LINKS

PBS Pricing Desk Guide
Pricing Implementation for Project Management

This page applies to:

Traditional✓ D/B✓ D/B-Bridging ✓ CMc
Project Team reviews PMP and implements move/coordination strategy. Team may hire professional move coordinators, IT/Security specialists, etc., as deemed necessary.

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

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

Systems Furniture 8.2.1.0.0.0

Telecommunications Coordination and Installation 8.2.2.0.0.0.a

Agency IT/Data Systems 8.2.3.0.0.0

Security Systems Installation 8.2.4.0.0.0

USMS A/V and Security System Installation 8.2.5.0.0.0

Judicial Security Prisoner Security

Tenant Move-In 8.2.6.0.0.0

Initial RENT start 8.1.3.0.0.0
8.0.0.0.0 Tenant Occupancy
Construction Manager as Constructor

8.2.1.0.0.0 Systems Furniture

-- Decision Tree --

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

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

2. **Agency** procures, installs, and inspects furniture installation.

3. Agency coordinates with Project Team

---

**DISCUSS AGE OF FURNITURE AND NEED FOR REPAIR/REPLACEMENT WITH TENANT AGENCIES**

---

**DOES TENANT NEED NEW FURNITURE?**

- **Yes**
  - **A/E** inventories furniture and provides furniture layout in the design
  - **Agency** coordinates with GSA field office for move of existing furniture

- **No**
  - **Agency** coordinates layout with design A/E
  - **Integrate into CPM schedule**

---

**WILL AGENCY USE IN-HOUSE SOURCES OR FSS?**

- **In-house**
  - **Will tenant use in-house sources for inventory and design or A/E?**
    - **Yes**
      - **Provide A/E estimate for inventory and furniture design**
      - **Obtain RWA from agency for furniture inventory and design**
      - **A/E inventories furniture and provides furniture layout in the design**
      - **Agency coordinates layout with design A/E**
      - **Federal Supply procures, installs, and inspects furniture installation**
    - **No**
      - **A/E**

---

**LINKS**

- PDS 2.5.0.0.0
- DD Submission (35%) 6.8.5.0.0.0
- Additional Phases Delivery (IT, Phases, Annexes) 7.1.13.0.0.0
- Furniture, Fixtures, and Equipment (FFE)/Move-In (Overview) 9.2.0.0.0.0

---

This page applies to:

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

Construction Manager as Constructor

8.2.0.0.0.a Telecommunications Installation - R&A

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

8.2.2.0.0.a Telecommunications Installation - R&A

Cost Estimates from FS 2.4.1.0.0.0.b
PDS Design Programming 2.5.0.0.0.0

Determines age of telecommunications system and need for repair/replacement

Does tenant need new telecommunications system?

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

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

Yes

Telecommunications Contracts

Agency procures, installs, and inspects telecommunications system installation

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

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

PDS 2.5.0.0.0.0
Furniture, Fixtures, and Equipment (FFE)/Move-In (Overview) 8.2.0.0.0.0
Agency IT Data Systems 8.2.3.0.0.0

This page applies to:

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

8.2.2.0.0.0.b Telecommunications Installation - New Construction

---

**LINKS**

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

---

**This page applies to:**

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

8.2.4.0.0.0 Security Systems Installation

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

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

GSA - Public Buildings Service 8.2.4.0.0.0 Tenant Occupancy Page 17
**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

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

**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*  
**8.2.6.0.0.0 Tenant Move-In**

**Project Team coordinates, negotiates, and mediates move in**

**Systems Furniture 8.2.1.0.0.0**  
**Agency IT/ Data Systems 8.2.3.0.0.0**  
**Security Systems Installation 8.2.4.0.0.0**  
**USMS A/V and Security Systems Installation 8.2.5.0.0.0**  
**Telecommunications Installation 8.2.2.0.0.0.a**

---

**Who will perform the move?**

**Tenant**  
**GSA**

**Tenant moves**

**Tenant coordinates move schedule with GSA property manager**

**Establish scope**

**Survey existing space**  
**Establish move-in schedule**  
**Establish responsibilities**

**Responsibilities, costs, funding, and schedules established**

**Establish cost**

---

**Tenants move in**

**GSA provides boxes, labels, and instructions for destination**

**Who will pack?**

**Tenant**  
**GSA**

**Survey furniture and equipment**  
**Determine when building is ready (all at once or phased)**

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

**Obtain quotes from move vendors**

---

**Who will perform the move?**

**Tenant**  
**GSA**

---

**Links**

- Furniture, Fixtures, and Equipment (FFE)/Move-In (Overview) 8.2.0.0.0.0
- Security Systems Installation 8.2.4.0.0.0

---

**This page applies to:**

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

---

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