PROJECT MANAGEMENT AND ACQUISITION PLAN
(ACQUISITION OF LEASEHOLD INTERESTS IN REAL PROPERTY)
FOR ACQUISITIONS UNDER THE SLAT THRESHOLD

This template is for lease actions up to the Simplified Lease Acquisition Threshold (SLAT). It combines the project management plan (required under current gPM initiatives) with the acquisition plan, for use primarily when the Leasing Specialist/Lease Contracting Officer assumes the role of Project Manager. For larger, complex projects, it is recommended the project management plan and acquisition plan remain as separate documents.

All leases, regardless of dollar value, require acquisition planning before beginning the procurement. For leases below the SLAT, there must be a written record in the lease file that acquisition planning did occur, even if it was done verbally. Completion of this template and entry into the lease file satisfies that requirement.

PROJECT NO.:

A. PROJECT DEFINITION/STATEMENT OF NEED:

1. Requiring Agency(ies):
2. Location of pending action: (CITY AND STATE)
3. Project background/trigger event: BRIEFLY SUMMARIZE EVENTS (LEASE EXPIRATION, NEED FOR EXPANSION, FEDERAL BUILDING SWING SPACE PROJECT, ETC.) LEADING TO THIS LEASEHOLD ACTION.
4. REXUS Action Type:
   TO CHECK A BOX, DOUBLE CLICK ON THE BOX, THEN CLICK ON “CHECKED” UNDER THE DEFAULT VALUE SECTION OF THE DIALOGUE BOX
   - New
   - New Replacing
   - Succeeding
   - Superseding
   - Expansion
   Within Scope?  Yes. Describe
   No. Will prepare an OTFO justification
   - Extension (GSAM 570.405)
     Select the purpose of the extension:
     - Construction Delay
     - Customer DID Prep. Delay
     - Lack of Agency Funding
     - Lack of Agency POR
     - Lessor Delay
     - Market Conditions
     - Strategic Portfolio Scheduling
     - Tactical Considerations
     - Other (workload, agency leaving PBS inventory, forced move, FEMA emergency, etc.)
     Describe:
   - Renewal (GSAM 570.401)
     - Evaluated
     - Unevaluated

5. Estimated Square Footage to be Acquired RSF; ABOA

   If Requirement Action Type is not a “New Requirement”, provide the following:
   a) Current lease number
   b) Building name and address
   c) Current square footage RSF; ABOA.
   d) Current annual rent rate $/RSF
   e) Lease expiration is
   f) If applicable, describe existing renewal option(s)
6. Lease Acquisition Model:
   - [ ] Standard Model
   - [ ] Streamlined Model
     - [ ] TI Option 1: Turn-Key with Post-Award DID Workshop
     - [ ] TI Option 2: TI Allowance with Post-Award DID Workshop
     - [ ] TI Option 3: Turn-Key with Pre-Award DID Workshop
   - [ ] Simplified Model
   - [ ] Succeeding/Superseding Model
   - [ ] On-Airport Model
   - [ ] N/A (Extensions/Expansions/Renewal Options)

7. Procurement Method
   - [ ] Full and Open Competition (GSAM 570.3)
     - Source Selection Procedures:
       - [ ] Lowest Price Technically Acceptable
       - [ ] Best Value (Tradeoff)
   - [ ] Other Than Full and Open Competition
     - [ ] Cost Based Rationale (Succeeding/Superseding Leases)
     - [ ] Mission-Based Rationale For Limiting Competition
     - Describe the mission-based rationale

8. Estimated Square Footage to be Acquired
   - RSF: ABOA

9. Delineated area considerations (Not applicable for extension or renewals)
   - [ ] Has definable boundaries
   - [ ] Does not unreasonably restrict competition

   EO 12072 (CHOOSE ONE)
   - [ ] Within CBA/fully in compliance
   - [ ] Agency justification and city consultation process completed; no issues
   - [ ] 12072 issues ongoing. Status:
   - [ ] Within a rural area/EO 12072 not applicable

   Wetlands and/or floodplains (CHOOSE ONE)
   - [ ] Are not present within delineated area
   - [ ] Are present within delineated area
   - [ ] Unknown

   Other NEPA considerations
   - Describe any pending or unresolved housing issues. Otherwise, insert “none”.

10. **Lease Terms:**
    1. **Initial Term includes the firm term (Government does not have termination rights during this period)**
    2. **And non-firm or “soft” term (Government has termination rights at any time during this period). Usually, the soft term will reflect a drop-off in the TI portion of the rent. Click “yes” on renewal options only when action involves a**
Known renewal option to be included in the RLP or to be exercised.

a) Initial Term in Months _____
   i) Firm Term in Months _____
   ii) Soft Term in Months _____

b) Renewal Option(s) □ Yes □ No
   If Yes, Option 1 Term _____, Option 2 Term _____

11. Total Contract Value Including Any Options

   NOTE: FORMAT BELOW REFLECTS TYPICAL LEASE TRANSACTION; REVISE AS NEEDED FOR YOUR ACQUISITION. RATES SHOULD REFLECT
   ANTICIPATED BLENDED RATES (INCLUDING AMORTIZED TENANT IMPROVEMENTS) BASED ON THE MARKET DATA, EXCLUDING OUTLIERS
   (HIGH AND LOW) OR THE RATE THAT BEST REFLECTS THE ANTICIPATED PROCUREMENT RESULTS, WHICHEVER IS HIGHER. RATES
   SHOULD REFLECT MARKET COMPARABLES SIMILAR TO REQUIREMENT

   a) Firm Term: XXX,XXX (Annual Rent) x X years = $XX,XXX,XXX
   b) Soft Term: XXX,XXX (Annual Rent) x X years = $XX,XXX,XXX

FILL IN c) AND d) ONLY WHEN RENEWAL OPTIONS WILL BE REQUIRED UNDER THE RLP. OTHERWISE DELETE

   c) Option 1: XXX,XXX (Annual Rent) x X years = $XX,XXX,XX
   d) Option 2: XXX,XXX (Annual Rent) x X years = $XX,XXX,XX

   e) Total Contract Value = $XX,XXX,XXX
      Fully Serviced □ Yes □ No If “No,” then Net of _____

B. ACQUISITION STRATEGY/PLAN OF ACTION

1. Indicate whether the National Broker Contract will be utilized to perform this acquisition. (Y/N)

2. Results of Market Research: Adequate competition anticipated? (Y/N) Number of locations identified

3. Environmental/Energy Conservation Objectives: The lease resulting from this action will include “green” clauses in
   conformity with the latest PBS policies. (Y/N)

4. Security. The client agency, GSA, and the Federal Protective Service will meet and determine the security level for
   this requirement taking into consideration the Interagency Security Council standards.

5. If the Lessor is a large business, then the lessor will be required to complete a Small Business Subcontracting Plan for
   inclusion as part of the lease.

6. Lease administration shall be conducted by the GSA field office. The agency has not requested any delegations.

7. Discuss other matters, if any, pertinent to the Plan that are not covered elsewhere. If none, indicate N/A.
C. ACQUISITION MILESTONES

For certain transaction (renewal, extensions, expansions), the milestone events below must be changed to reflect the respective project action. For example, a renewal action would not require issuance of a Request for Lease Proposal (RLP), but should instead indicate the date to “Exercise Option.” Key project events (award and effective dates) in system [REXUS] must match milestone events.

1. Customer Request
2. Market Survey Report Approval
3. Issue Solicitation
4. Receipt of Initial Offers
5. Final Proposal Revisions Received
6. Lease Award
7. Lease Term Commencement
8. Occupancy

D. REVIEW, CONCURRENCE, AND APPROVAL.

<table>
<thead>
<tr>
<th>Thresholds (Including All Options)</th>
<th>Approving Official</th>
</tr>
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<tbody>
<tr>
<td>Below the Simplified Lease Acquisition Threshold (SLAT) defined in GSAM Part 570.</td>
<td>Lease Contracting Officer</td>
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</tbody>
</table>

Prepared by:

Typed Name
Project Manager/Leasing Specialist

Date

Approved by:

Typed Name
Lease Contracting Officer (LCO)

Date

Submit to: Office of Acquisition Policy, Office of Governmentwide Policy at acquisitionplans@gsa.gov within 7 days of approval (pdf format preferred). Use the following subject line content protocol: High Risk Contract* (if applicable); Service Name; Region Number; Project Number; Location; Contracting Officer Name; Estimated Contract Value (aggregate).

*High Risk Contract includes sole source acquisitions**, lease construction, or excessively high market rates.

**Office of Governmentwide Policy has clarified that succeeding leases are not always considered “high risk” and therefore should be identified using the phrase “Other Than Full and Open Competition” in lieu of “high risk.”