

## PBS Client Enrichment Series – Q & A



### **Topic: Occupancy Planning and Solutions**

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**Link to Client Enrichment Series Information:** [www.gsa.gov/ces](http://www.gsa.gov/ces)

### **Additional Occupancy Planning and Solutions Information:**

[Occupancy Planning and Solutions Development](http://www.gsa.gov/real-estate/real-estate-services/for-federal-customers/occupancy-planning-and-requirements-development) - <https://www.gsa.gov/real-estate/real-estate-services/for-federal-customers/occupancy-planning-and-requirements-development>

### **Planning and Requirements: Planning early to get the right solutions**

**1. Question: If an agency needs additional office space for expansion of staff presence in a geographic area, who should be the FIRST point of contact? The local PBS representative?**

**Answer:** Typically, your Regional Planning Manager in your servicing Region will take point on this effort. If you do not know who your regional planning manager is, you can contact your agency's [National Customer Lead](#) for more information..

**2. Question: Who submits budget requests to OMB - GSA or the agency?**

**Answer:** GSA prepares for each agency a Rent Estimate (based on existing or planned occupancies) for you to plan for your agency's budget submission to OMB.

**3. Question: Where can a CPA document/template be found on the GSA website?**

**Answer:** In your slide deck, there's an Appendix at the end with screenshots of our CPA document. A pdf of the template can be found linked [here](#).

**4. Question: Do all regions use the CPA 1& 2 ?**

**Answer:** All regions are mandated to use the CPA part 1 and 2. Part 1 is the information GSA shares to you, evaluating the current space, market and opportunity to modernize or lower costs, and begins the collaboration between you and GSA. Part 2 of the CPA



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captures the strategic requirements and documents the agreed upon occupancy strategy.

**5. Question: Is the 12-24 month space requirements the same for GSA owned/leased facilities?**

**Answer:** That is the goal. We have some flexibility with federal space, but we do try to meet the same timeline for early engagement, in some cases we would approach you even earlier due to the funding that is needed for buildout.

**6. Question: I've heard not all GSA Regions implement the CPA. Is it mandated for use for all space requirements packages?**

**Answer:** Yes, CPAs, (Parts 1 & 2) are mandated for all regions as of 2017.

**7. Question: Why is the SF-81 not accepted?**

**Answer:** The SF 81 is accepted as a form of communication from any agency. The Client Project Agreement is a much more involved document, and can pull info from your sf81 and our Planning Managers will collaborate with you to fill out the remainder of the CPA if additional info is needed or to share concepts that may further identify opportunity for the space solution. Your SF 81 or any form of communication that reflect your space needs is accepted. The CPA just solidifies the need and ensures GSA and the client agency are aligned on the occupancy strategy.

**8. Question: What if we can't sign the CPA? Does an email showing concurrence suffice?**

**Answer:** Yes, a concurrence by email or in writing is accepted.

## Requirements Development- Services and Tools - Breaking down the Barriers:

**9. Question: If my agency wants to do a workplace engagement for a space project, how long does it typically take to finish?**

**Answer:** For non-prospectus projects, a workplace engagement will typically take 5 - 8 months depending on the complexity and size of the project. A smaller project consisting of a single homogenous organization and personnel less than 100 people would likely take 5 months. Conversely, a large project consisting of multiple organizations and over 500 people could take the full 8 months. This time includes conducting diagnostic research efforts (eg, employee surveys), developing workplace



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strategy recommendations and space program calculations, and refining the space program calculations with organizational leadership and/or points of contact.

For prospectus projects, a workplace engagement will take about 9 months, split in two parts. Activities that contribute to the prospectus submission, such as the housing plan, take approximately 4 months. Once the prospectus is approved and the details workplace requirements need to be determined, the remaining workplace engagement activities will take about 5 months as some on of the information collected before the prospectus submission will need to be “refreshed”.

The above durations are when a workplace consultant is on-board and ready to begin work. Since the preceding procurement time will vary depending on available contracting vehicles, time of the fiscal year, available budget, etc., it is highly recommended that if a client agency is interested in GSA’s workplace services that they reach out to [workplace@gsa.gov](mailto:workplace@gsa.gov) or their National Client Executive as early as possible.

**10. Question: My agency is looking at using more desk sharing and working from home. How do you take this into account?**

**Answer:** Desk sharing, working from home, and other modible work arrangements are an integral part of the GSA’s workplace strategy services. Utilizing the Activity Based Planning approach, GSA investigates and when appropriate, recommends mobile work strategies that are ideally suited for the nature of the work being accomplished as well as the overall goals of the organization. See a recording of our [CES session Activity Based Planning on YouTube playlist](#).

**11. Question: You mentioned change management earlier. How does that relate to developing requirements?**

**Answer:** Change management efforts should begin whenever a significant workplace change is even possible, such as transitioning from private offices to workstations or dramatically reducing the size of the overall office space. Identifying the overall changes that may need to be considered, allows the requirements development efforts to also inform the specific change management tactics that should be pursued.

For example, if a dramatic reduction in space is required, then it might be beneficial to investigate an expansion of current telework policies. Then if desk sharing is determined to be required to accomplish the workplace change, then the organization and its employees are better prepared to adopt this workplace strategy.

A common approach is for the development of a change management plan to be developed in conjunction with a workplace strategy engagement. The information

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collected from the diagnostic research activities, such as the employee survey and focus groups, can inform both the space requirements and the steps needed for the organization to prepare for the new workplace.

**12. Question: How are unions considered in the workplace engagement process?**

**Answer:** GSA's advice is to involve the unions as much as possible, and as early as possible. For workplace strategy engagements, a common starting step is to brief the union representatives on the workplace activities and address any questions. For example, if an employee survey is envisioned the briefing would include walking through the questions, describing why the data is used, how all responses are anonymous, and that the survey is optional. Union representatives are also encouraged to attend employee focus groups. It has been found, consistently, that when union representatives and other stakeholders are informed about the workplace engagement and offer to participate, it leads to a more productive experience and outcome.

**13. Question: The Public Broadcasting Service had reported on open spaces decreasing productivity. How is GSA addressing this major concern?**

**Answer:** Creating an effective workplace that maximizes occupant productivity is at the core of GSA's workplace strategy services. GSA also recognizes that a workplace created for one organization that helps them accomplish their mission, may be completely ineffective or even detrimental for another agency. Whether an open space decreases or increases productivity depends on the work being accomplished in that space and the extent that the overall workplace, not just the workstations, have been designed with these work practices in mind.

Using GSA's Activity Based Planning approach, GSA first identifies and understands those concerns about workplace performance, such as acoustic distractions in an open workplace or organizational disconnectedness in a workplace that's mostly a private office. GSA then uses these insights to recommend strategies that address all factors that contribute to workplace effectiveness, including office space layout, furniture, technology, and organizational culture.

**14. Question: Is there a website and password to use WIFM? Is there a cost associated with using the tool?**

**Answer:** WIFM is not available on the gsa.gov web site at this time. WIFM is a stand-alone Excel file that is completely self-contained, with no connection to outside

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data sources. Please email [ryan.doerfler@gsa.gov](mailto:ryan.doerfler@gsa.gov) to receive a copy and schedule a training session. You can view a recording of our [CES session featuring the “WIFM” tool on our CES YouTube playlist](#).

**15. Question: What do these types of services cost? Is there a fee for this workplace service? Like many agencies, we have tight budgets, but want to be strategic in our approach to working lease vs owned occupancies.**

**Answer:** This really depends on the deliverables you're looking for. Reach out to [workplace@gsa.gov](mailto:workplace@gsa.gov) to reach our team of Workplace Strategy experts, directly to [Ryan.Doerfler@gsa.gov](mailto:Ryan.Doerfler@gsa.gov), or to the Regional Workplace lead in your servicing Region (a map of contacts is available in the Appendix slides at the end of this slide deck) to discuss your needs, and costs.

**16. Question: How do we get the Work Pattern Space Calculation Tool?**

**Answer:** You can get a copy of the Work Pattern Space Calculation Tool by emailing [ryan.doerfler@gsa.gov](mailto:ryan.doerfler@gsa.gov).

**17. Question: Is Fitwell or Well Building certification considered when GSA works with a customer?**

**Answer:** While GSA does not have policy requiring its buildings achieve a certification through Fitwel or the WELL Building Standard, both systems have areas that would help agencies meet the Guiding Principles for Sustainable Federal Buildings. GSA's Green Building Advisory Committee developed a [Health and Wellness Guidance crosswalk](#) that shows where health and wellness concepts within certification systems can help agencies meet certain federal building performance requirements contained in the Guiding Principles.

**18. Question: How do we start this if we are in the prospectus process?**

**Answer:** GSA's workplace strategy services are equally suitable for prospectus and non-prospectus projects. For example, GSA's Activity Based Planning approaches for understanding organizational priorities and employee work patterns, as well as engaging the entire organization in workplace change, can be used for projects of any size. Similarly, change management strategies can be developed for any project regardless of scope.

The only significant difference between non-prospectus and prospectus projects is the

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timing of the underlying workplace activities. For prospectus projects, workplace strategy activities are phased over time recognizing that client requirements may change as the project project is developed, approved by Congress, designed, constructed, and occupied.and implementation. The best approach for exploring workplace services on a prospectus project is to reach out to GSA as early as possible. Inquiries can be either sent to the GSA Center for Workplace Strategy at [workplace@gsa.gov](mailto:workplace@gsa.gov) or the Regional Workplace Executive responsible for the covered GSA region (see slide 75 of the CES appendix).

**19. Question: Will GSA do WIFM for agencies with agency-owned space?**

**Answer:** WIFM is an Excel tool that has been designed for agencies to use on their own for evaluating the financial and spatial impact of workplace changes. While WIFM considers a wide variety of variables, such as desk sharing, the building type and ownership nature are not a consideration.

**20. Question: Can you use FIT in federal space, or just leased space?**

**Answer:** The GSA FIT program can be used in GSA controlled space (leased or federally owned). The FIT program cannot be used for agencies in delegated leases or federal properties that are not owned by GSA.

**21. Question: Are there success stories with agencies that used the FIT Program?**

**Answer:** We have utilized the GSA FIT program with a wide variety of federal partners to advance new workplace strategies and help them reduce their footprint. The FIT program helps agencies minimize upfront capital needs by offering a leasing option for furniture and IT equipment.

**22. Question: Many of the boards and Commissions have high URs due to large office, special space and few employees. The prepackage space solutions would probably work well for them in terms of better utilization, but they don't have the funding to reduce nor do they want to move/reduce. What is our strategy in getting them to more efficient space?**

**Answer:** Generally speaking, the most effective strategy is to first understand the nature of the work being accomplished and the overall mission or business goals that the organization is seeking to achieve. With this information, appropriately sized mix of individual workspaces (eg, workstations, private offices) and support spaces (eg, meeting rooms) are identified that would best support the organization in accomplishing

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that work in the future. For those agencies that anticipate a significant reduction in space, change management services are often recommended.

GSA is constantly seeking new opportunities to help client agencies in this area. All occupancies are reviewed to identify potential opportunities for achieving space efficiency. GSA's Center for Workplace Strategy and its network of Regional Workplace Executives work with client agencies at national and regional levels to further identify opportunities, and to provide workplace strategy services within client agency budget constraints. Finally, GSA continually releases new approaches and tools, such as Prepackaged Space Solutions or the Workplace Investment & Feasibility Modeling tool, that seek to streamline and cost-effectively provide high-quality workplace consulting advice to the federal community.

### ***Breaking Down the Barriers: Faster Delivery of Services***

#### **23. Question: What are the restrictions on using Prepackaged Space Solutions for my project?**

**Answer:** Prepackaged Space Solutions is a fast requirements development method that is intended for space projects which are composed of nearly 100% commercial office type space, such as workstations, private offices, open collaboration areas, meeting rooms, and break areas. If a location has special space, such as a server room or laboratory, that project would not be eligible for the Prepackaged Space Solutions approach.

#### **24. Question: Can I customize the layout using Prepackaged?**

**Answer:** The overall layout of a Prepackaged Space Solution model can not be customized. However, some of the elements can be adjusted. Workstation sizes can be changed as long as the total workstation area doesn't change. Also, enclosed spaces can be changed to another enclosed space. For example, from an office to a meeting room. There are limitations that were purposefully included in the Prepackaged Space Solution approach in order to minimize requirements development time.

#### **25. Question: Does AAAP only work for larger projects?**

**Answer:** The ideal path for online tool consideration starts with AAAP. If you have an office space requirement, at or above 500 ABOA sf, for full and open competition - please consider AAAP.

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**26. Question: Is there a formal exception required to use a traditional procurement process in lieu of AAAP?**

**Answer:** There isn't a formal exception, as a business and resource strategy to improve life cycle and quality of the rates PBS heavily encourages the use of the online leasing platform. If AAAP is not preferred, the region would have to shift strategies to go with another procurement style. PBS is intentionally moving away from traditional lease procurements in their strategy to develop a better customer experience.

**27. Question: Are these slides available for Non-GSA Agencies?**

**Answer:** The slides, along with the session recording and formal Q&A will be posted on the Client Enrichment Series website - [www.gsa.gov/ces](http://www.gsa.gov/ces).

**28. Question: How do we find out what procurement style or online tool we are using if the PM hasn't told us?**

**Answer:** The Planning Manager or Project Manager should be able to inform you. PBS plans projects well in advance as to what tool or procurement style is going to be used in order to set proper resource and tool strategies.

**29. Question: Can we switch the design method after award, if not when is the right time to dictate this?**

**Answer:** Switching design methods after award can be done, but may cause a change order. The upfront conversations should discuss the design methods as well as the procurement method that will be used.

**30. Question: Wondering instead of GSA & the agency working on DID's, why wouldn't we create standard specs, finishes, details as a packet of information to hand over to the A&E to develop design & CD's of the space?**

**Answer:** During the requirements development phase of the project, the customer can and is encouraged to bring high level details of standard specifications, finishes and performance specifications to deliver the space with velocity and accuracy with the customer specific needs.

**31. Question: I thought items permanently connected to the facility are generally not considered personal property. Is that a change? In a leased property, doesn't that property now belong to the property owner once installed? And therefore, their responsibility for disposal?**

**Answer:** Things like tanks, HVAC (chillers, coolers) units, etc. can be considered personal property. Absent a conveyance or purchase agreement between the agency



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and the building owner, the property still belongs to the agency and is thereby the responsibility of the agency to dispose of. The Personal Property Division could assist the agency with disposal and the ultimate recipient (of transfer or sale) would be responsible for de-installation. Note: Pricing policy also addresses personal property belonging to the customer agency (see Pricing Desk Guide Chapter 2.5.9 and 3.6.9 for further clarification regarding personal property at this link: [www.gsa.gov/rentpricingpolicy](http://www.gsa.gov/rentpricingpolicy)).

**32. Question: What do federal regulations say about disposing of personal property and acquiring personal property?**

**Answer:** FAR Subpart 8.102 reads: When practicable, agencies shall use excess personal property as the first source of supply for agency and cost-reimbursement contractor requirements. Agency personnel shall make positive efforts to satisfy agency requirements by obtaining and using excess personal property (including that suitable for adaptation or substitution) before initiating a contract action.

FMR 102-36.35 (a) reads: You must ensure personal property not needed by your activity is offered for use elsewhere within your agency. If the property is no longer needed by any activity within your agency, your agency declares the property excess and reports it to GSA for possible transfer to eligible recipients, including Federal agencies for direct use or for use by their contractors, project grantees, or cooperative agreement recipients. All executive agencies must, to the maximum extent practicable, fill requirements for personal property by using existing agency property or by obtaining excess property from other Federal agencies in lieu of new procurements.

**33. Question: How do I find out about who my agency's National Utilization Officer is?**

**Answer:** To find out who your NUO is, visit our website at: [www.gsa.gov/property](http://www.gsa.gov/property). Click on the National Utilization Officers link in the right margin.

**34. Question: Is someone from GSA available to explain the funding solutions to our CFO office?**

**Answer:** Yes, please reach out to your [National Customer Lead](#) or corresponding point of contact and we will coordinate the meeting.

**35. Question: Is GSA funding for PORs and any services Ryan was referencing?**

**Answer:** In some instances workplace strategy services are provided to client agencies without charge, such as the Work Pattern Space Calculation tool and WIFM. Similarly, a limited amount of requirements development services are provided as part of the PBS

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Fee in the GSA's pricing policy, such as through GLS+ for leased spaces. The majority of workplace strategy and Program of Requirement (POR) services, however, are funded by the client agency by RWA.

**36. Question: Is the WIFM available for download on the GSA site?**

**Answer:** To request access or demos of the WIFM or Work Pattern tool, please send an email to [Ryan.Doerfler@gsa.gov](mailto:Ryan.Doerfler@gsa.gov). You can watch Ryan's "WIFM" tool presentation on our YouTube Channel at <https://www.youtube.com/watch?v=nC3YCfQhZ8I>

**37. Question: How is this different from the GSA Return to Workplace Planning Services available for PBS Customers IDIQ fee based service?**

**Answer:** PBS's Center for Workplace Strategy has a national A/E/I IDIQ contract with 12 firms that can be used on a variety of workplace and design needs. The new Return to Workplace Planning Services IDIQ contract consists of a specific selection of 10 services that have been pre-scoped to help speed up the planning and procurement process. The same 12 national firms are available to assist with these Return to Workplace services. For additional information, visit the [GSA Return to Facilities webpage](#) or reach out to [workplace@gsa.gov](mailto:workplace@gsa.gov).

**38. Question: What kind of scheduling tool for in-office occupancy does GSA use? Is it a GSA developed tool?**

**Answer:** GSA currently uses a tool called "BookIT" as our in-house workspace reservation system from Agilquest.

**39. Question: Since COVID will not be going away completely, have adjustments been considered and designed for HVAC and air flow?**

**Answer:** In GSA operated buildings, CDC HVAC recommendations will be incorporated based on existing equipment, current configuration, and re-occupancy schedules, including disabling demand-control ventilation, increasing operating hours, increasing use of outside air, ensuring air filters are properly sealed, and upgrading air handler filtration efficiency. GSA is notifying lessors for all active GSA leases that they are expected, as the landlord, to follow current industry practices by considering the application of the latest CDC guidance concerning building ventilation and water systems.

**40. Question: DID workshop is not an option for my agency. There is no way to get several senior managers to take a few days to attend a workshop. Why not try to shave time off TICS table review, shell vs TI cost?**

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**Answer:** DID workshops should always be an option, GSA delivers highly detailed projects with major stakeholders in a virtual environment consistently using DID workshops. The example used within the presentation was a VA Community Based Outpatient Center which is a 200,000 ABOA SF medical center that has over 30 services and departments that requires the input from the department directors, doctors and commissioners within the medical center. In a DID workshop, not all needs to be in person; some can be in a virtual setting for their specific section of the project.

**41. Question: Can my agency work with GSA to add branding to the signs provided in the Strategy Book? And also, can we work with you to develop a few signs that would be specific to our agency's needs?**

**Answer:** We worked with a contractor to develop all of the signs that you will find in downloadable format in the Strategy Book, however we anticipated that agencies might need to add logos, change text, or an agency may even need some additional signs. GSA has created the Return to Workplace Service IDIQ contract that can be used for additional signage needs. You can find information on this service contract on GSA's [Safer Federal Workplace](#) website.

**42. Question: My facility headcount is over 3,000 people. Since that is above the extra-large headcount range, how would my project be priced?**

**Answer:** For very large organizations, we would anticipate that the overall facility could be broken out into separate, smaller departments that have specific needs. By breaking down the groups into smaller departments or functional groups, this will ensure that space and phasing needs are considered at the right level. As a result, a very large project might be priced into a few smaller projects.

**43. Question: Why do we need accurate floor plans in AutoCAD? What if the furniture isn't shown?**

**Answer:** CAD files will allow us to more accurately measure and map out the required physical distancing needed, which will allow for a more accurate capacity estimation. In the absence of furniture on floor plans, an agency may need to have someone on-site to sketch the location of the furniture and indicate dimensions, or use a series of photos to indicate furniture placement. For a cost, a GSA workplace professional can assist with putting the sketch and photos into AutoCAD.

**44. Question: How long does the demand analysis process take?**

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**Answer:** The length of the services is dependent on the project headcount and complexity. Typically demand analysis would take between 1-8 weeks. 8 weeks is a realistic timeline, for a typical project. 1 week would only be for very small and non-complex projects.

**45. Question: Why do some of the Return to Workplace services have prerequisites? Is there a way to skip some of the prerequisites to save money?**

**Answer:** Many of the services build upon each other. For example, Service #1 - *Demand Analysis* is used to determine who needs to return to the workplace in early phases. Service #2 - *Capacity Analysis* determines the appropriate capacity based on physical distancing. Service #3 - *Occupancy Stacking Scenarios* uses the information from both previous services to determine where and when business lines would be assigned to a workspace. It is possible that an agency may have already completed demand analysis in-house. The agency would need to provide any demand analysis info to the contractor so that they can perform a gap analysis and ensure there aren't any missing pieces of info. GSA and the contractor may be able to reduce or eliminate the demand analysis service if the agency-provided info is comprehensive.

### **Breaking Down the Barriers: Funding Solutions**

**46. Question: I am working with an agency that wants to stay in place and says they do not have funds to move but are in way more space than they need. Can the Move Cost Program still be used if the agency stays in place?**

**Answer:** Yes, while the Program is called "Move Cost Lessor Funded Option", there is specific language in the RLP that delineates how to offer if you are the incumbent. Again, the intended use of the program is to help agencies fund their move into an optimized footprint. If the agency is able to reduce their space in their current location, we support that decision and the Lessor Funded Option can assist in that scenario as well.

**47. Question: What if the customer has reservations about the CFO certifying lack of funds in order to use the Move Cost Program?**

**Answer:** We have recently revised the Lease Acquisition Circular Language that pertains to the agency CFO certifying lack of funding for the replacement of their expiring lease. The updated language relaxes the requirement to include a less austere statement from the agency basically stating that they do not have money budgeted for the specific project in the year that award is projected.

**48. Question: For the Lessor Funded Project Liquidity Option, does the Lessor or Government do the contracting for moves costs and personal property?**

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**Answer:** The Government provides the requirements to the Lessor and the Lessor procures the Move Contract and or the Furniture. The ownership of the furniture stays with the Lessor for the duration of the lease. The Government can not procure the move or furniture and get reimbursed by the Lessor for these costs, it must be procured by the Lessor.

**49. Question: Is the Lessor Funded Option Program available when the procurement vehicle is AAAP?**

**Answer:** Not at this time. Due to the specific language required in the RLP and Lease, AAAP can not be used at this time. Due to the flexibility of the Move Cost option, the procurement needs to be done in house or with broker assistance.