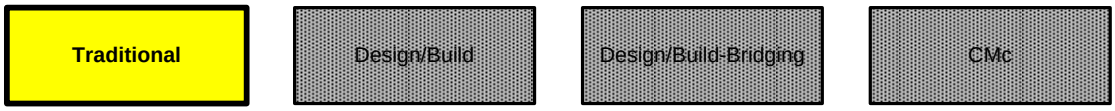
PM Guide

Traditional
Design/Build (D/B)
Design/Build-Bridging (D/B-B)
Construction Management as Constructor (CMc)

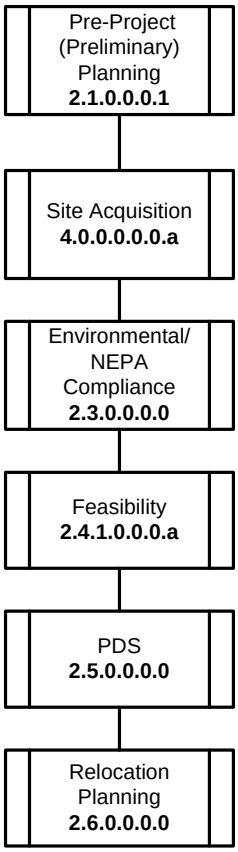


This page applies to:
☑ Traditional ☑ D/B ☑ D/B-Bridging ☑ CMc

Planning
2.0.0.0.0.0

2.0.0.0.0.0 Planning
Traditional
2.0.0.0.0.0 Planning

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

Project Coordination 1.1.0.0.0.0.a

Project Coordination exists at every level

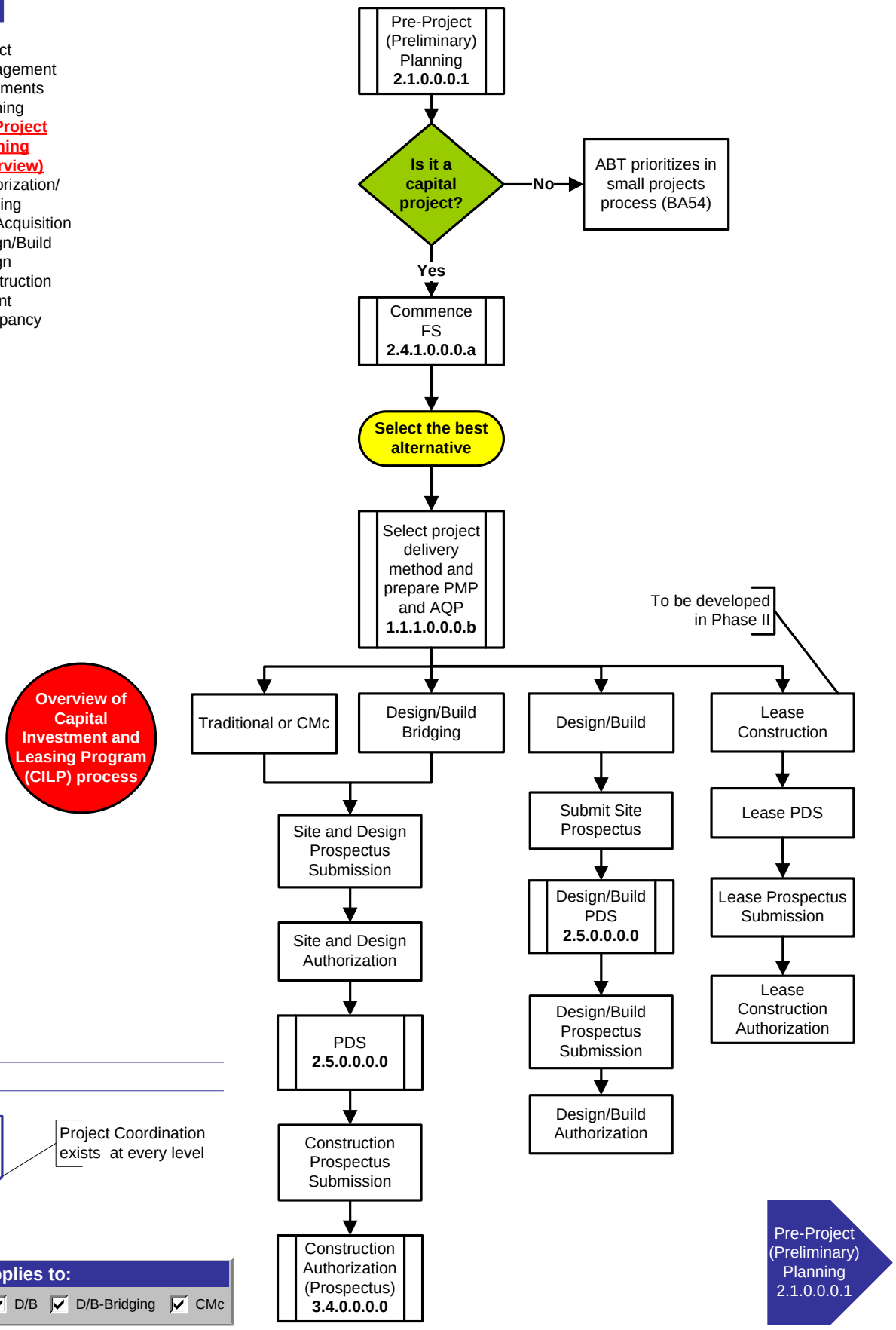
This page applies to:

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

Pre-Project Planning (Overview) 2.1.0.0.0.0

2.0.0.0.0.0 Planning
Traditional
2.1.0.0.0.0 Pre-Project Planning (Overview)

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



LINKS

Project Coordination 1.1.0.0.0.0.a

Project Coordination exists at every level

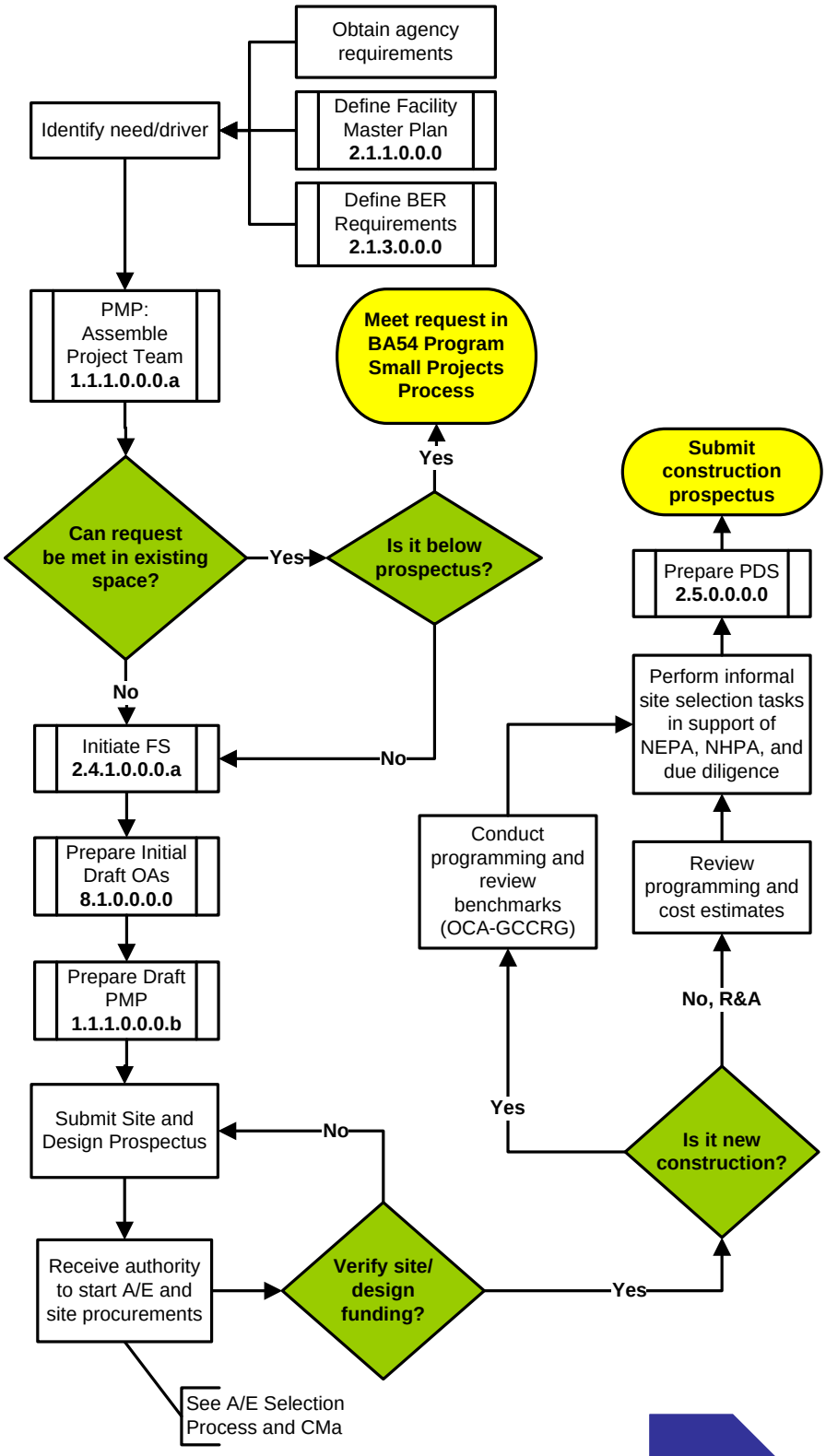
This page applies to:

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

Pre-Project (Preliminary) Planning 2.1.0.0.0.1

2.0.0.0.0.0 Planning
Traditional
2.1.0.0.0.1 Pre-Project (Preliminary) Planning

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
2.1.0.0.0.1 Pre-Project (Preliminary) 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: Assemble Team 1.1.1.0.0.0.a

NHPA 2.2.0.0.0.0

A/E Procurement (Overview) 6.2.0.0.0.0

CMa SOW 6.3.1.0.0.0.a

This page applies to:

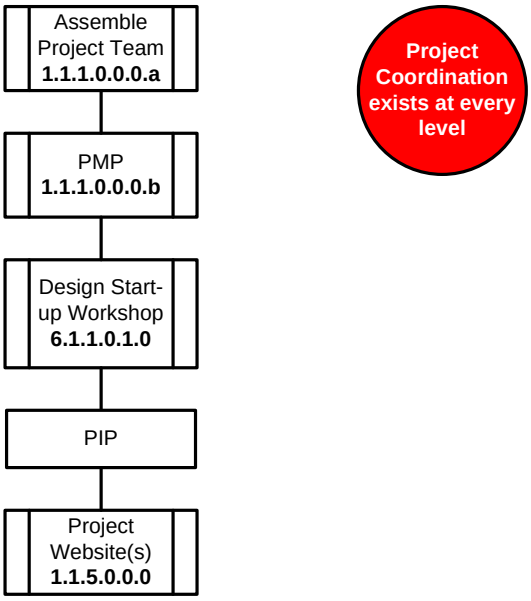
☑ Traditional ☐ D/B ☑ D/B-Bridging ☑ CMc

Project Coordination 1.1.0.0.0.0.a

Pre-Project (Preliminary) Planning 2.1.0.0.0.1

1.0.0.0.0.0 Project Management Documents
Traditional
1.1.0.0.0.0.a Project Coordination

1.0.0.0.0.0 Project Management Documents
1.1.0.0.0.0.a Project Coordination
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

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

Pre-Project (Preliminary) Planning 2.1.0.0.0.1

Project Coordination 1.1.0.0.0.0.a

1.0.0.0.0.0 Project Management Documents
Traditional
1.1.1.0.0.0.a PMP: Assemble Project Team

1.0.0.0.0.0 Project Management Documents
1.1.1.0.0.0.a PMP: Assemble Project Team
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

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 2.2.0.0.0.0
NEPA 2.3.0.0.0.0
Feasibility 2.4.1.0.0.0.a
PDS 2.5.0.0.0.0
Site Acquisition 4.0.0.0.0.0.a

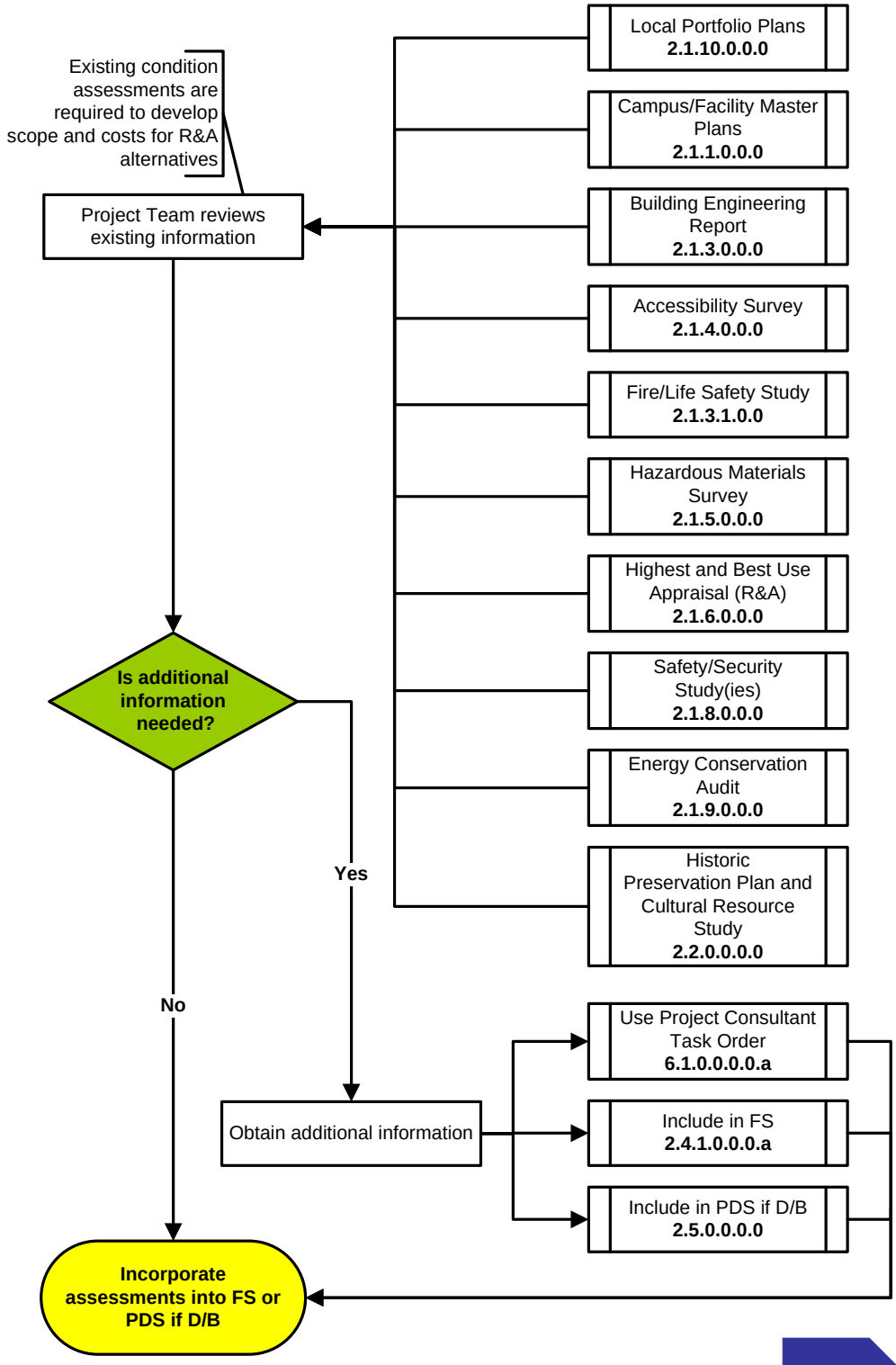
This page applies to:
☑ Traditional ☑ D/B ☑ D/B-Bridging ☑ CMc

Existing Conditions Assessments 2.1.12.0.2.0

2.1.12.0.2.0 Existing Conditions Assessments

PMP: Assemble Project Team 1.1.1.0.0.0.a

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
2.1.12.0.2.0 Existing Conditions Assessments
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



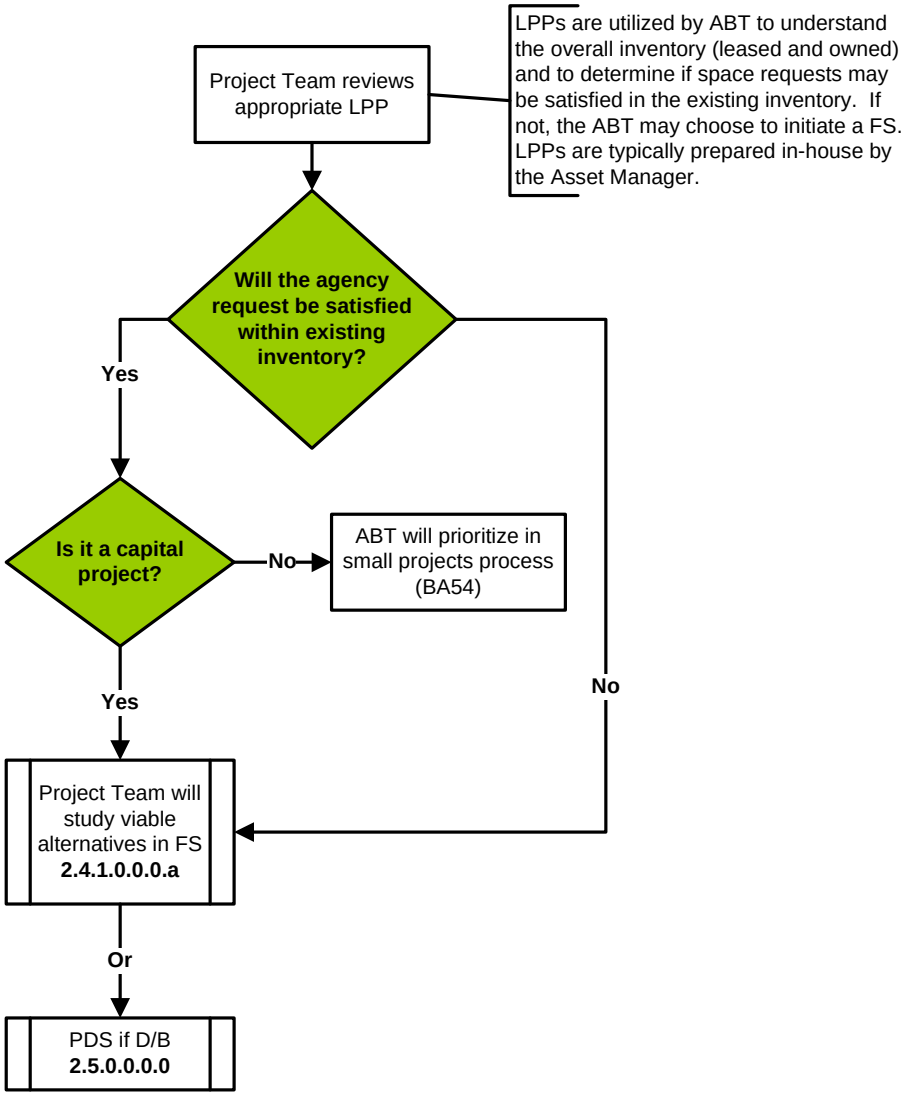
Feasibility 2.4.1.0.0.0.a

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

Existing Conditions Assessments 2.1.12.0.2.0

2.0.0.0.0.0 Planning
Traditional
2.1.10.0.0.0 Local Portfolio Plans

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
2.1.10.0.0.0 Local Portfolio Plans
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

Feasibility 2.4.1.0.0.0.a

This page applies to:

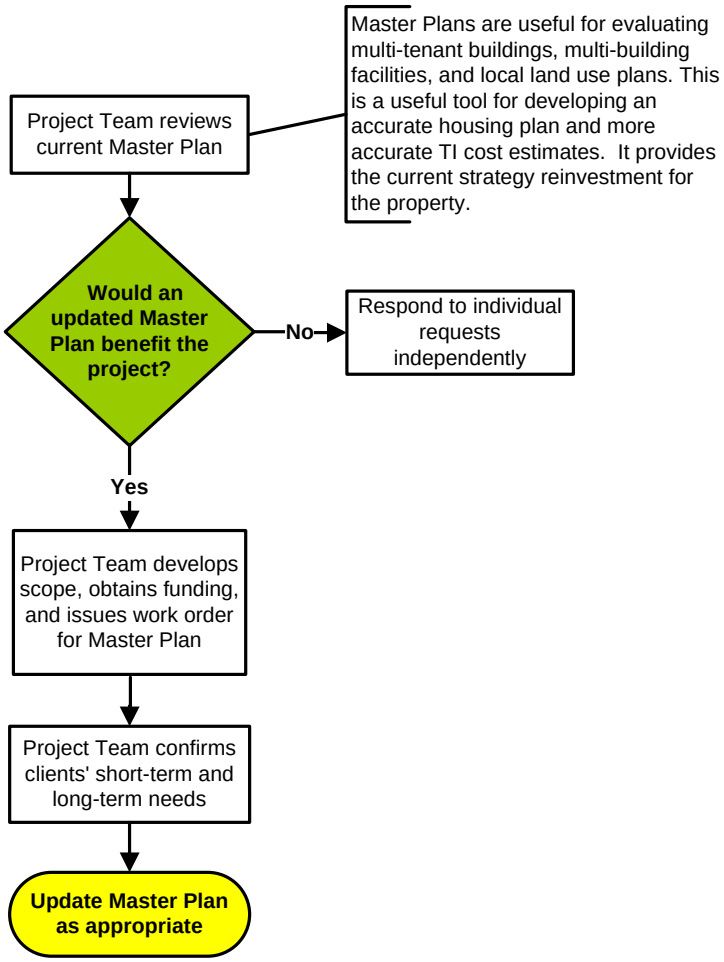
☑ Traditional ☑ D/B ☑ D/B-Bridging ☑ CMc

Existing Conditions Assessments 2.1.12.0.2.0

Local Portfolio Plans 2.1.10.0.0.0

2.0.0.0.0.0 Planning
Traditional
2.1.1.0.0.0 Campus/Facility Master Plans

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
2.1.1.0.0.0 Campus/ Facility Master Plans
3.0.0.0.0.0 Authorization/ Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design/Build
6.0.0.0.0.0 Design
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy



This page applies to:

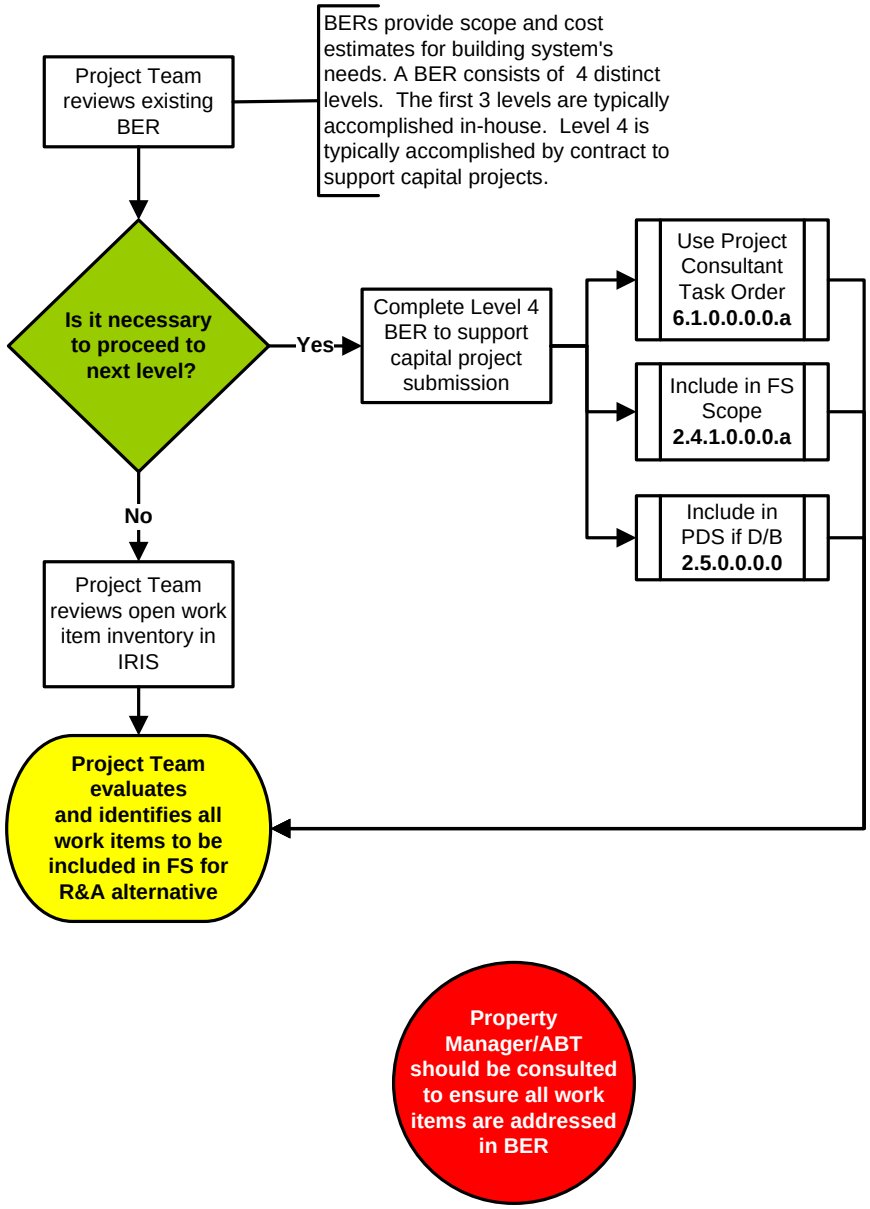
☑ Traditional ☑ D/B ☑ D/B-Bridging ☑ CMc

Building/ Engineering Report 2.1.3.0.0.0

Existing Conditions Assessments 2.1.12.0.2.0

2.0.0.0.0.0 Planning
Traditional
2.1.3.0.0.0 Building Engineering Report

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
2.1.3.0.0.0 Building Engineering Report
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



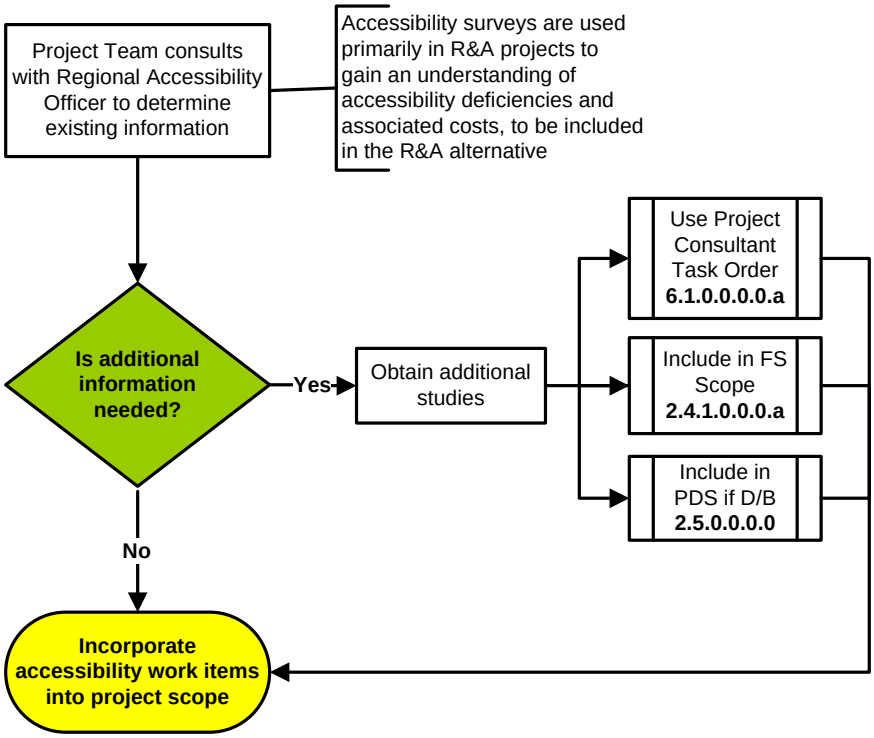
Property Manager/ABT should be consulted to ensure all work items are addressed in BER

Existing Conditions Assessments 2.1.12.0.2.0

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

2.0.0.0.0.0 Planning
Traditional
2.1.4.0.0.0 Accessibility Survey

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



LINKS

ADA | PBS-P100 | UFAS

This page applies to:

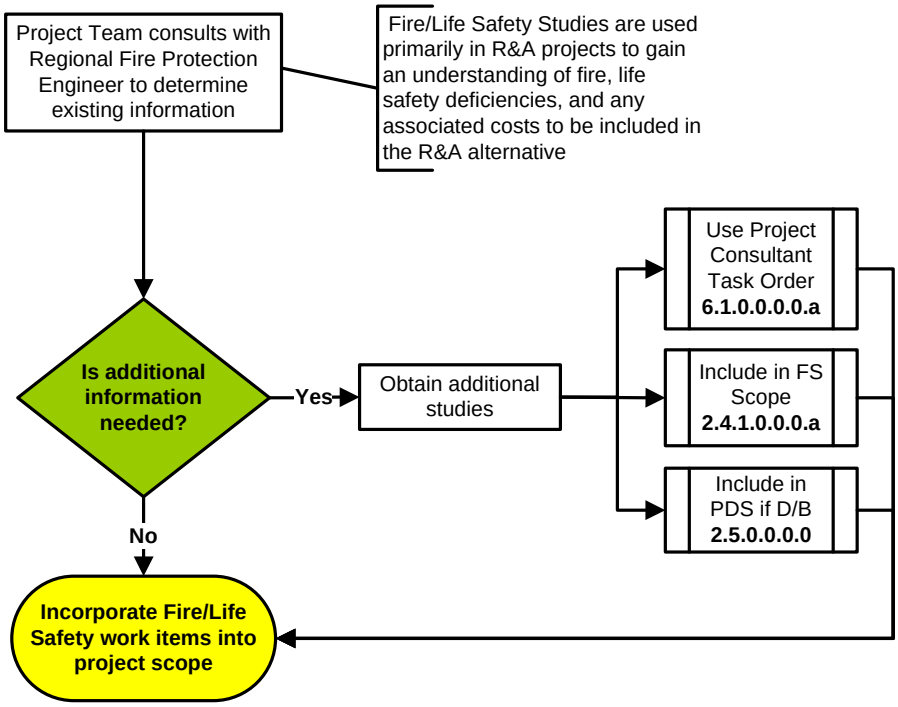
☑ Traditional ☑ D/B ☑ D/B-Bridging ☑ CMc

Fire/Life Safety Study 2.1.3.1.0.0

Existing Conditions Assessments 2.1.12.0.2.0

2.0.0.0.0.0 Planning
Traditional
2.1.3.1.0.0 Fire/Life Safety Study

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
2.1.3.1.0.0 Fire/Life Safety Study
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

PBS-P100

This page applies to:

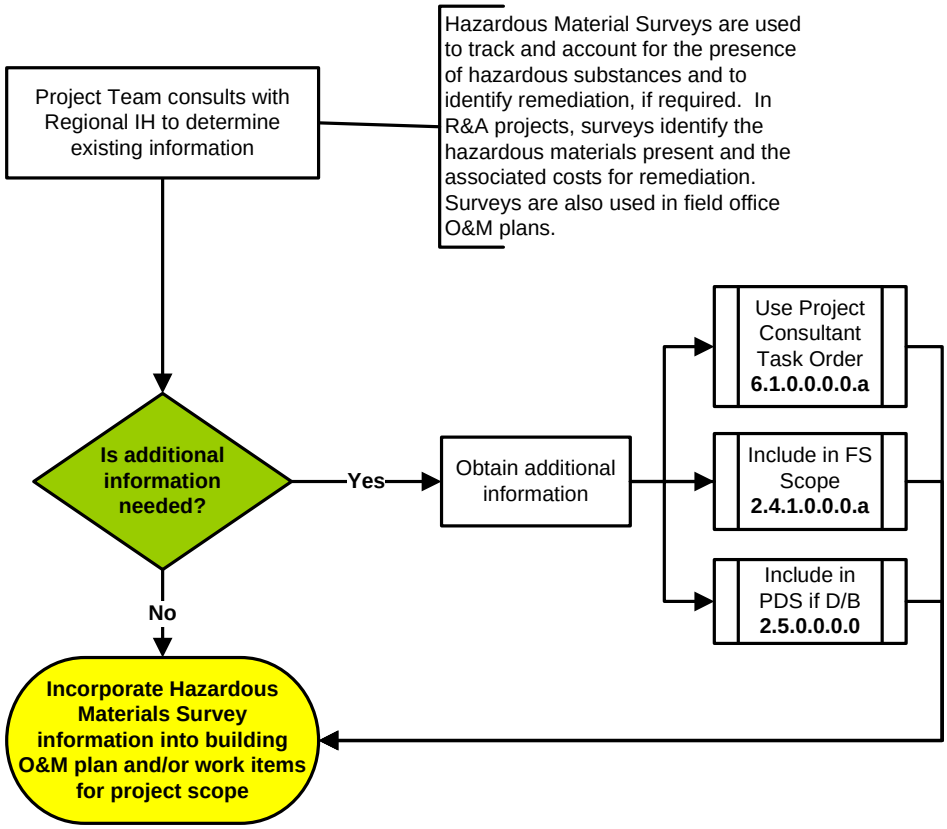
☑ Traditional ☑ D/B ☑ D/B-Bridging ☑ CMc

Existing Conditions Assessments 2.1.12.0.2.0

Existing Conditions Assessments 2.1.12.0.2.0

2.0.0.0.0.0 Planning
Traditional
2.1.5.0.0.0 Hazardous Materials Survey

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



This page applies to:

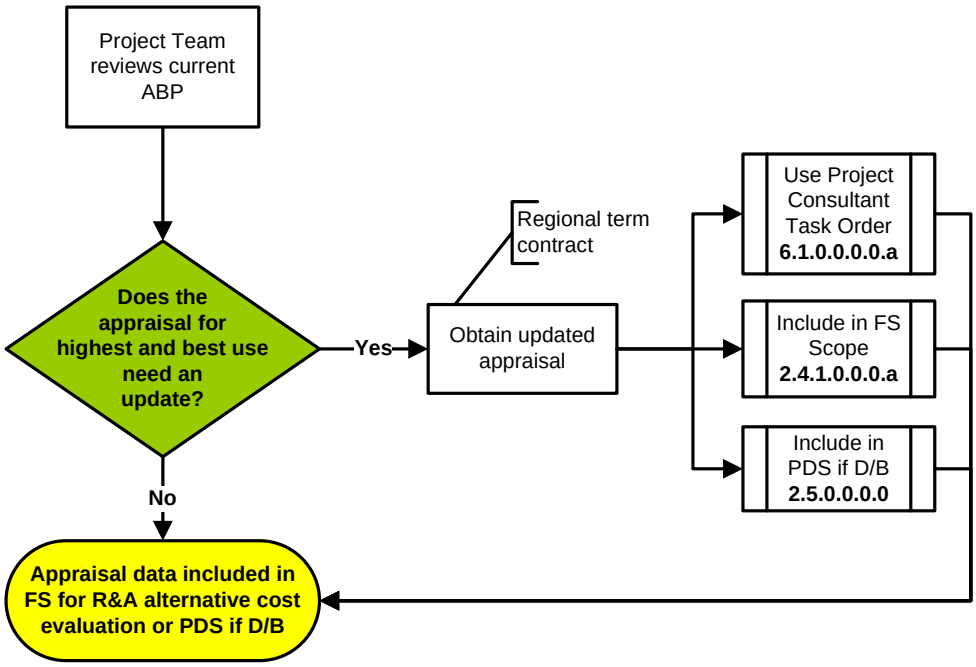
☑ Traditional ☑ D/B ☑ D/B-Bridging ☑ CMc

Existing Conditions Assessments 2.1.12.0.2.0

Existing Conditions Assessments 2.1.12.0.2.0

2.0.0.0.0.0 Planning
Traditional
2.1.6.0.0.0 Highest and Best Use Appraisal (R&A)

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
2.1.6.0.0.0 Highest and Best Use Appraisal (R&A)
3.0.0.0.0.0 Authorization/ Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design/Build
6.0.0.0.0.0 Design
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy



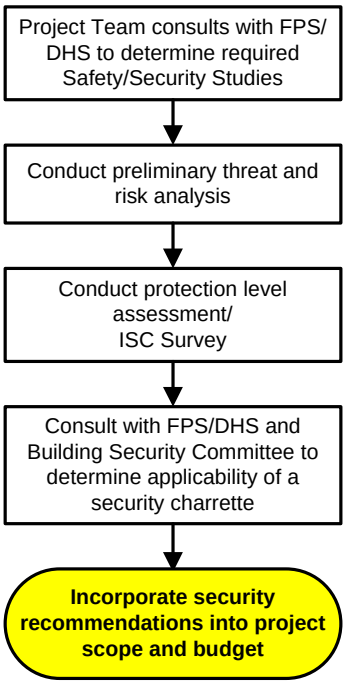
This page applies to:

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

Existing Conditions Assessments 2.1.12.0.2.0

2.0.0.0.0.0.0 Planning
Traditional
2.1.8.0.0.0.0 Safety/Security Study(ies)

1.0.0.0.0.0 Project Management Documents
2.1.8.0.0.0 Safety/ Security Study(ies)
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



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

LINKS

ISC | PBS-P100

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

Energy Conservation Audit 2.1.9.0.0.0

Existing Conditions Assessments 2.1.12.0.2.0

2.0.0.0.0.0 Planning
Traditional
2.1.9.0.0.0 Energy Conservation Audit

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
2.1.9.0.0.0 Energy Conservation Audit
3.0.0.0.0.0 Authorization/ Funding
4.0.0.0.0.0 Site Acquisition
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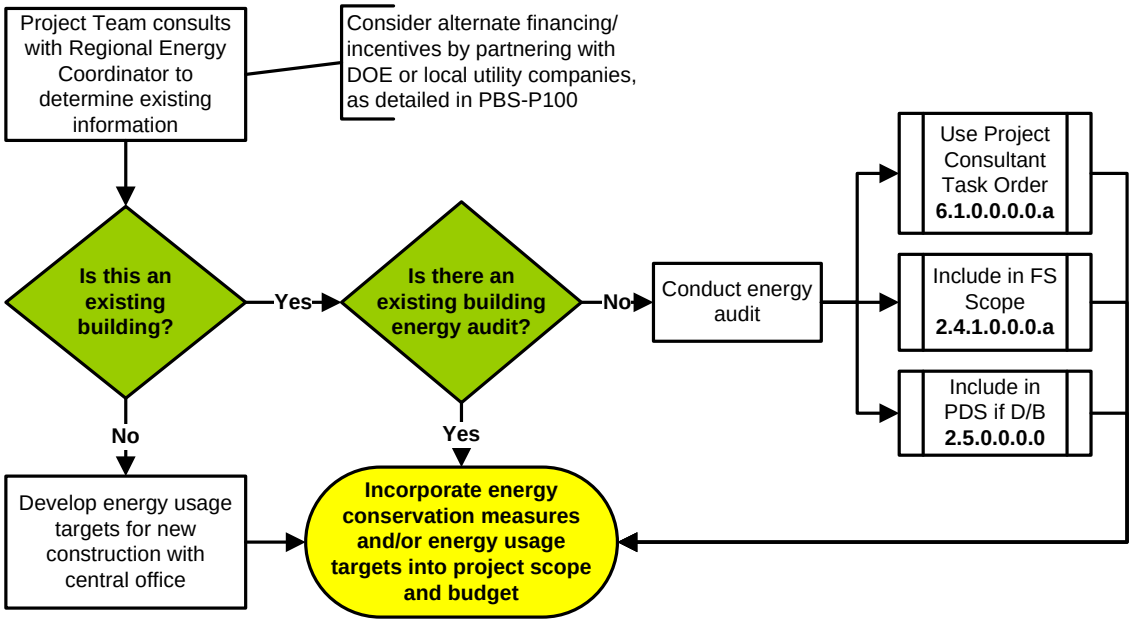
6.0.0.0.0.0 Design
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy



LINKS

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

This page applies to:

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

Existing Conditions Assessments 2.1.12.0.2.0

Existing Conditions Assessments 2.1.12.0.2.0

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

Include PDS scope if D/B **2.5.0.0.0.0**

Project Team prepares SOW for FS

Coordinate NEPA Phase I and NHPA studies/ consultations as needed to evaluate viable options and site information **2.2.0.0.0.0**

Asset Manager provides client housing information

Award appropriate work to contractors

- Feasibility: R&A **2.4.1.0.0.0.c**
- Feasibility: New **2.4.1.0.0.0.d**
- Feasibility: Lease **2.4.1.0.0.0.e**

Compile available technical studies

Additional technical studies required?

Yes → Obtain necessary studies by contract **2.1.12.0.2.0**

No

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

Identify alternatives and implementation strategies

Develop cost estimates by Shell and TI

Define building security amortized capital costs

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

Asset Manager performs inventory analysis and financial analysis

- LPP
- TAPS
- Proforma
- Develop Site Budget **4.0.0.0.0.0.b**

Conduct risk assessment for project alternatives

Identify preferred alternative

Identify project delivery method and A/E selection process

Complete FS — **Or** → Complete PDS if D/B **2.5.0.0.0.0**

LINKS

- DEP&P
- GSA Guidebook I – Acquisition of Real Property
- GSA Guidebook II – Relocation of Residents and Businesses
- NEPA
- NHPA
- PBS Pricing Desk Guide
- Pre-Project Planning Guide
- Preservation Desk Guide
- Pricing Implementation for Project Management
- PMP 1.1.1.0.0.0.b
- Pre-Project (Preliminary) Planning 2.1.0.0.0.1
- NHPA 2.2.0.0.0.0
- OAs and RENT (Overview) 8.1.0.0.0.0

Feasibility 2.4.1.0.0.0.a

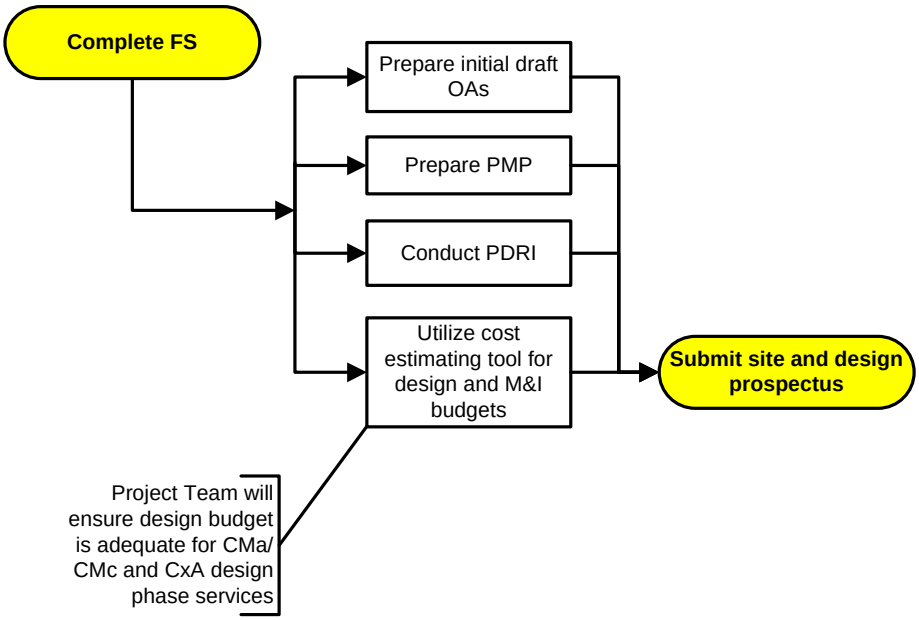
PDS 2.5.0.0.0.0

This page applies to:

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

2.0.0.0.0.0 Planning
Traditional
2.4.1.0.0.0.b Feasibility (Continued)

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
2.4.1.0.0.0.b Feasibility (Continued)
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

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 1.1.1.0.0.0.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

Feasibility: R&A
2.4.1.0.0.0.c

6.3.0.0.0.0 CMa/Commissioning Authority (Cx) Services

Feasibility 2.4.1.0.0.0.a

PDS 2.5.0.0.0.0

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
6.3.0.0.0.0 CMa/ Commissioning Authority (Cx) Services
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy

The PPT contains WBS and detailed project tasks for Cx and QAPs

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

Programmatic discussion may be found in the Building Cx Guide

Planning

Project Team will need Cx assistance during preparation of the FS

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 CMAA Construction 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

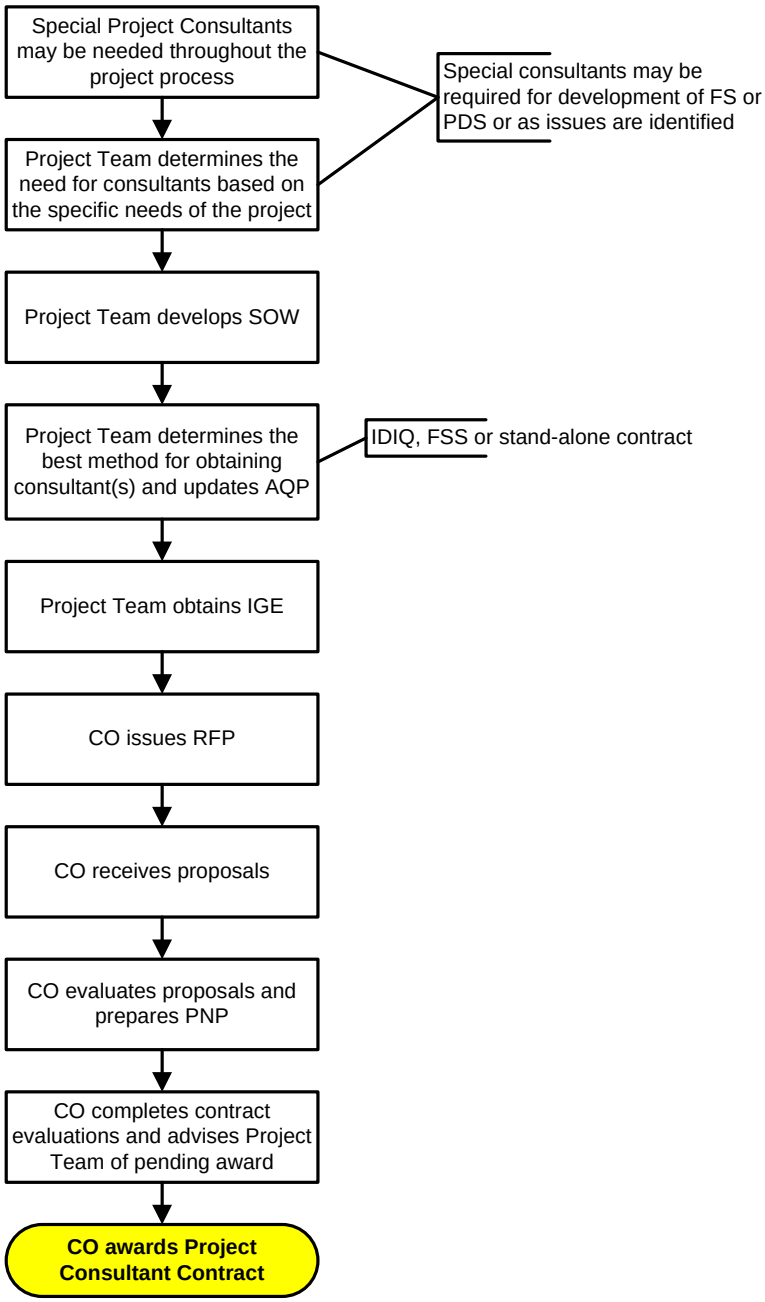
CxA SOW (if apart from CMa) 6.3.1.0.0.0.b

6.1.0.0.0.0.a Project Consultant Task Order

PMP 1.1.1.0.0.0.b

Acquisition Plan Program/ Project 1.1.1.0.0.0.c

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



LINKS

Acquisition Plan | FS | PDS

PMP Reference | Sample PNM | Sample PNP

This page applies to:

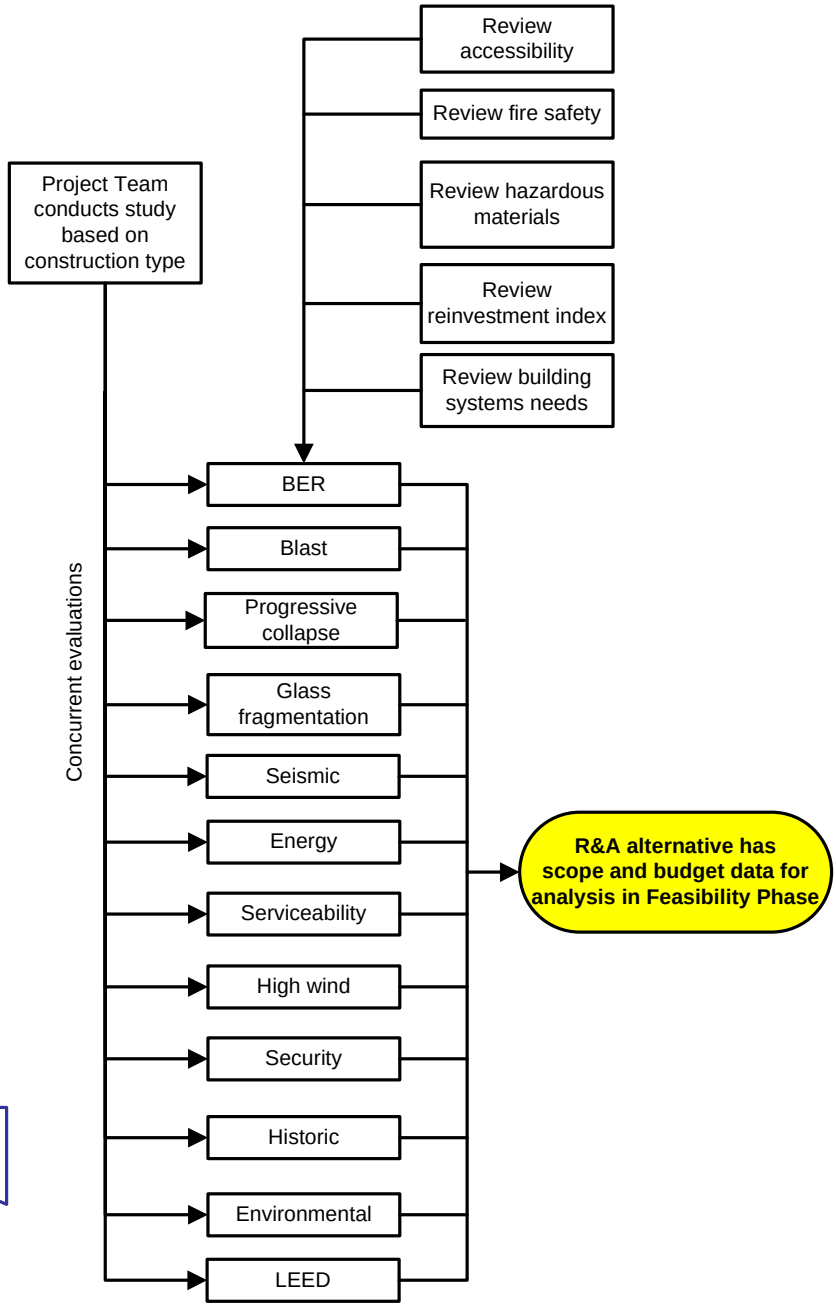
☑ Traditional ☑ D/B ☑ D/B-Bridging ☑ CMc

PMP 1.1.1.0.0.0.b

Acquisition Plan Program/ Project 1.1.1.0.0.0.c

2.0.0.0.0.0 Planning
Traditional
2.4.1.0.0.0.c Feasibility: R&A

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
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

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

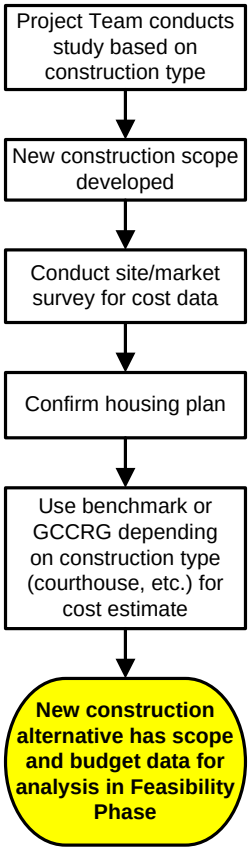
This page applies to:

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

Feasibility
2.4.1.0.0.0.a

2.0.0.0.0.0.0 Planning
Traditional
2.4.1.0.0.0.d Feasibility: New Construction

1.0.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0.0 Planning
2.4.1.0.0.0.d Feasibility: New Construction
3.0.0.0.0.0.0 Authorization/ Funding
4.0.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0.0 Design/Build
6.0.0.0.0.0.0 Design
7.0.0.0.0.0.0 Construction
8.0.0.0.0.0.0 Tenant Occupancy



LINKS

GSA Guidebook I – Acquisition of Real Property

GSA Guidebook II – Relocation of Residents and Businesses

PBS-P100

PMP 1.1.1.0.0.0.b

Pre-Project (Preliminary) Planning 2.1.0.0.0.1

NEPA 2.3.0.0.0.0

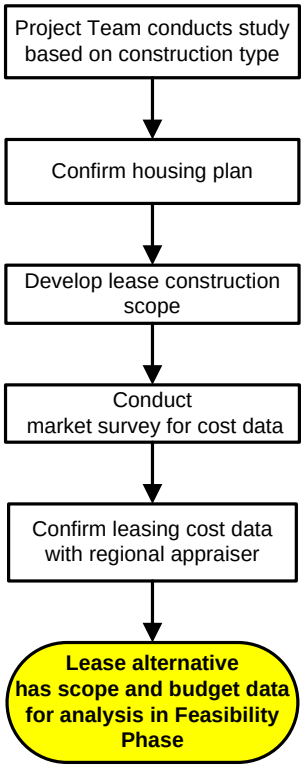
This page applies to:

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

2.0.0.0.0.0.0 Planning
Traditional
2.4.1.0.0.0.e Feasibility: Lease Construction

1.0.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0.0 Planning
2.4.1.0.0.0.e Feasibility: Lease Construction
3.0.0.0.0.0.0 Authorization/ Funding
4.0.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0.0 Design/Build
6.0.0.0.0.0.0 Design
7.0.0.0.0.0.0 Construction
8.0.0.0.0.0.0 Tenant Occupancy

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 1.1.1.0.0.0.b

Pre-Project (Preliminary) Planning 2.1.0.0.0.1

NHPA 2.2.0.0.0.0

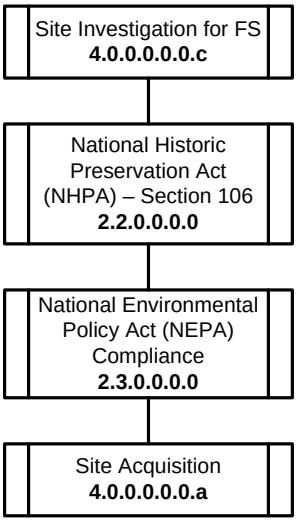
NEPA 2.3.0.0.0.0

This page applies to:

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

2.0.0.0.0.0 Planning
Traditional
4.0.0.0.0.0.a Site Acquisition

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

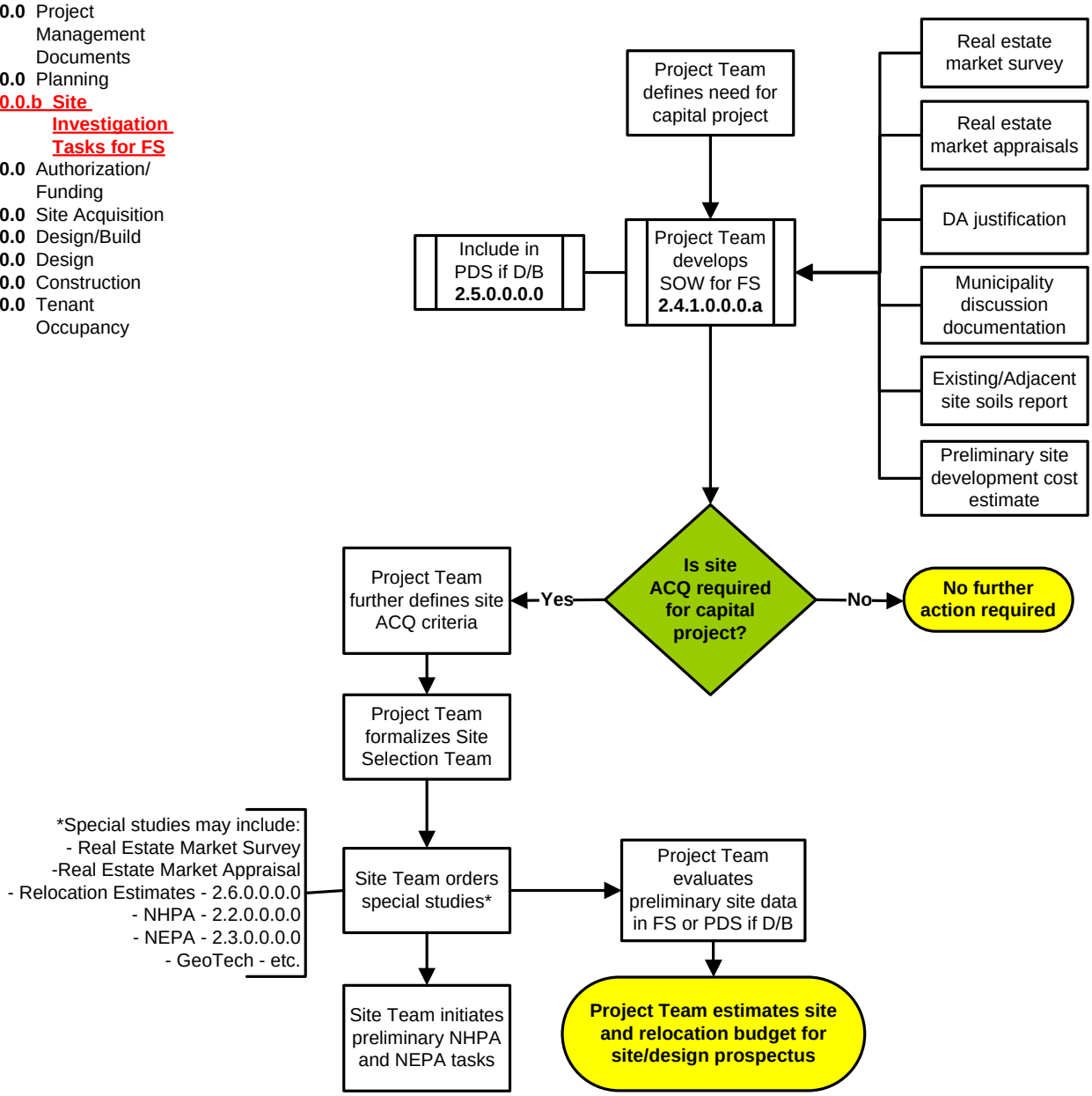


This page applies to:

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

2.0.0.0.0.0 Planning
Traditional
4.0.0.0.0.0.b Site Investigation Tasks for FS

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
4.0.0.0.0.0.b Site Investigation Tasks for FS
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

Fact Sheet on Executive Order 13006

This page applies to:

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

Project Funding Request 2.4.4.0.0.0

4.0.0.0.0.0.c Site Investigation for FS

Feasibility
2.4.1.0.0.0.a

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
4.0.0.0.0.0.c Site Investigation for FS
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

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

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

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.

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

Concurrent Activities

Concurrent Activities

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

Allow 6-12 months in project schedule

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

Allow 6-15 months in project schedule

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

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

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

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

NHPA 2.2.0.0.0.0

NEPA 2.3.0.0.0.0

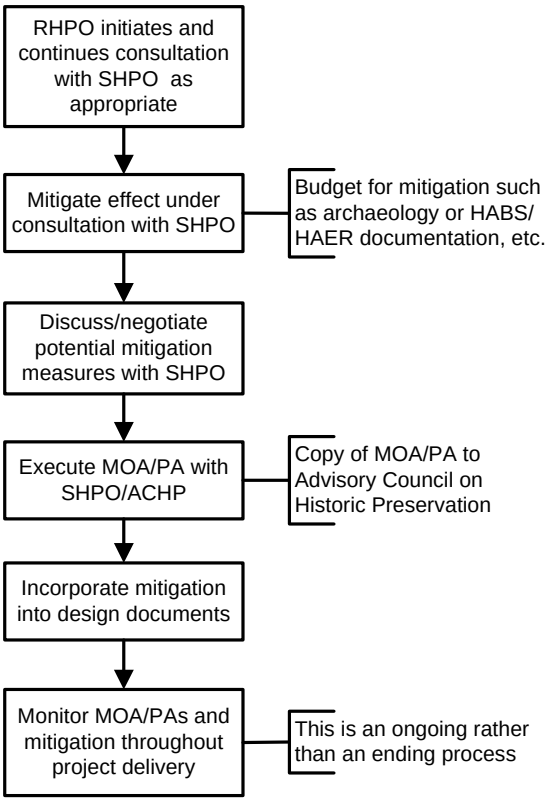
Feasibility 2.4.1.0.0.0.a

This page applies to:

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

2.0.0.0.0.0.0 Planning
Traditional
2.2.0.0.0.0.0 NHPA Tasks for FS through Site Acquisition

1.0.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0.0 Planning
2.2.0.0.0.0.0 NHPA Tasks for FS through Site Acquisition
3.0.0.0.0.0.0 Authorization/ Funding
4.0.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0.0 Design/Build
6.0.0.0.0.0.0 Design
7.0.0.0.0.0.0 Construction
8.0.0.0.0.0.0 Tenant Occupancy



RHPO updates Project Team as needed

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.a

PMP 1.1.1.0.0.0.b

Planning 2.0.0.0.0.0

Relocation Planning 2.6.0.0.0.0

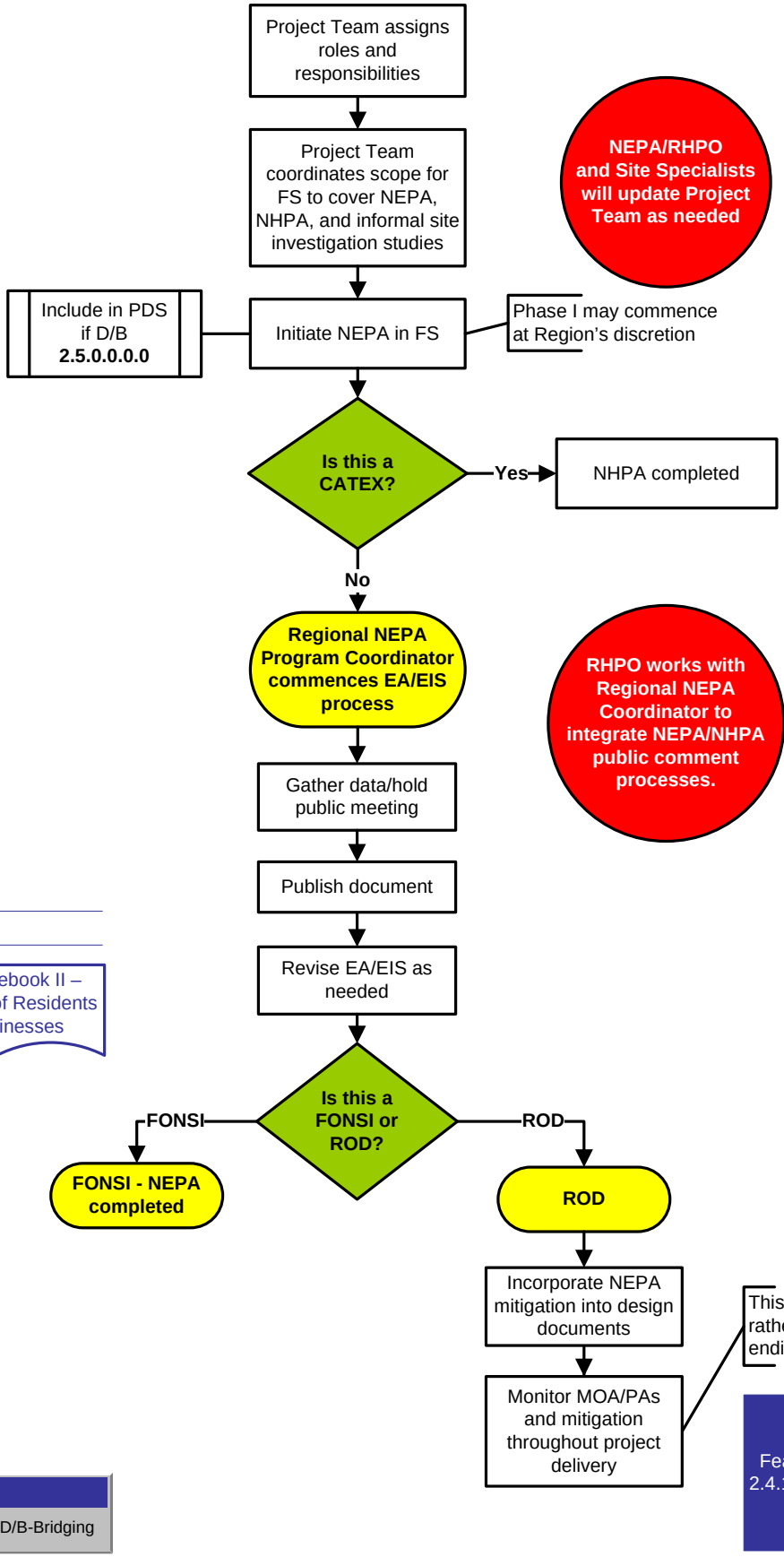
This page applies to:

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

2.3.0.0.0.0 NEPA Tasks for FS through Site Acquisition

Feasibility
2.4.1.0.0.0.a

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
2.3.0.0.0.0 NEPA Tasks for FS through Site Acquisition
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

GSA Guidebook I – Acquisition of Real Property

GSA Guidebook II – Relocation of Residents and Businesses

NEPA

NHPA

PMP: Assemble Project Team 1.1.1.0.0.0.a

PMP 1.1.1.0.0.0.b

Planning 2.0.0.0.0.0

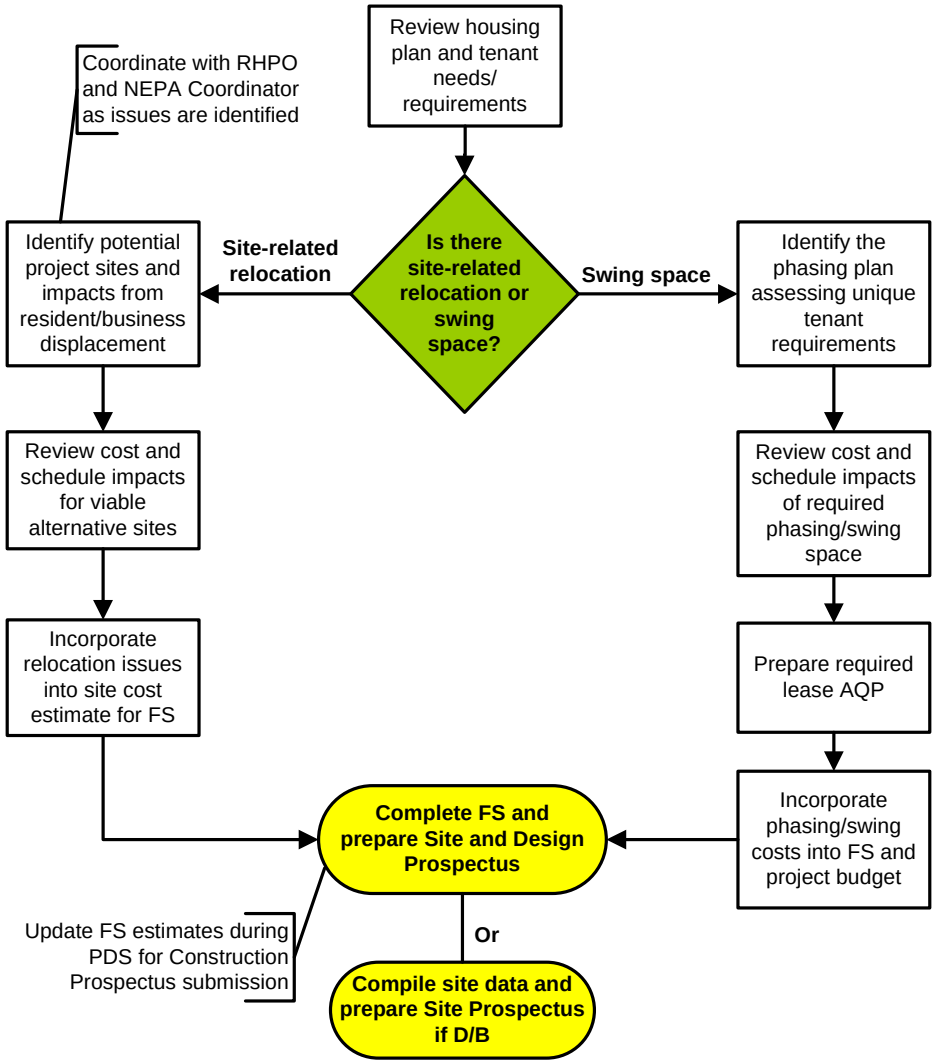
Relocation Planning 2.6.0.0.0.0

This page applies to:

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

2.0.0.0.0.0.0 Planning
Traditional
2.6.0.0.0.0.0 Relocation Planning

1.0.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0.0 Planning
2.6.0.0.0.0.0 Relocation Planning
3.0.0.0.0.0.0 Authorization/ Funding
4.0.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0.0 Design/Build
6.0.0.0.0.0.0 Design
7.0.0.0.0.0.0 Construction
8.0.0.0.0.0.0 Tenant Occupancy



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

1.1.2.0.0.0 Commissioning Authority (Cx) (Overview)

Feasibility 2.4.1.0.0.0.a

PDS 2.5.0.0.0.0

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
1.1.2.0.0.0 Commissioning Authority (Cx) (Overview)
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy

The PPT contains WBS and detailed project tasks for Cx

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

Programmatic discussion may be found in the Building Cx Guide

Planning

Project Team identifies lead on Cx task/team

Design

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

Construction

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

Post Construction

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

Develop preliminary Cx Plan and required budget in FS

Update Cx Plan as building systems are identified and designed

Conduct owner training and Turnover Cx Record

Perform Satisfaction Review with tenants and submit findings to Project Team

Cx integrated into FS and updated in PDS

Contract documents aligned with GSA/PBS' Project Requirements

Systems performance documented and accepted

System performance sustained

Feasibility 2.4.1.0.0.0.a

PDS 2.5.0.0.0.0

CxA SOW (if apart from CMa) 6.3.1.0.0.0.b

CMa Task Order/CxA Task Order 6.3.2.0.0.0

LINKS

Building Cx Guide | PBS-P100 | PPT

Professional Services Estimating Tool

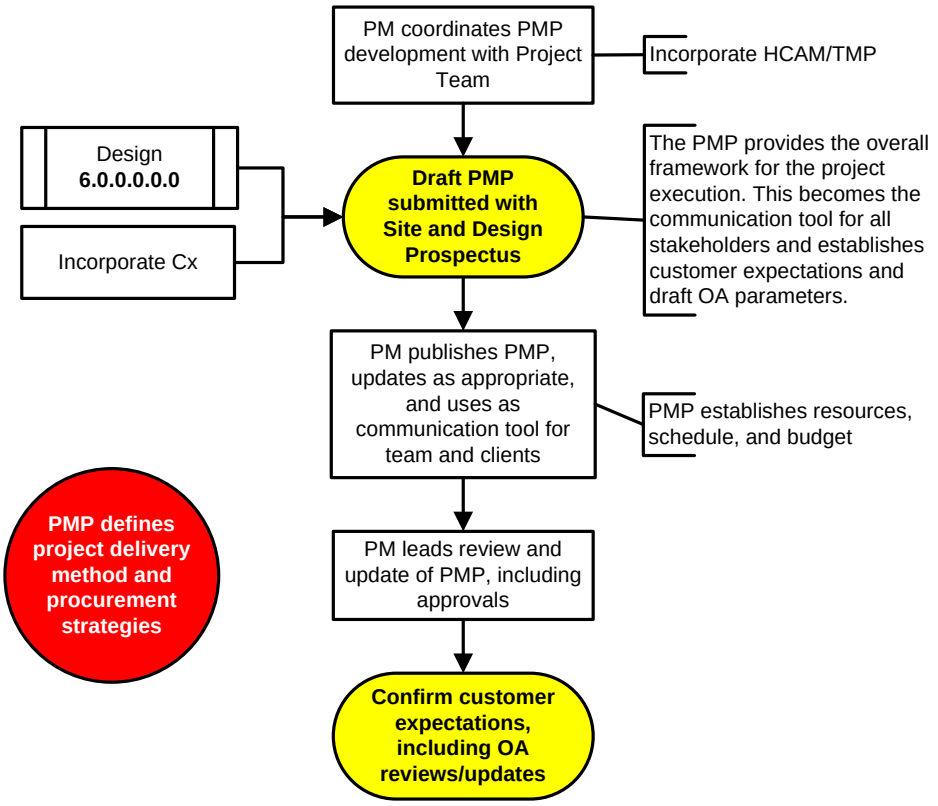
This page applies to:

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

Pre-Project (Preliminary) Planning 2.1.0.0.0.1

1.0.0.0.0.0 Project Management Documents
Traditional
1.1.1.0.0.0.b Project Management Plan (PMP)

1.0.0.0.0.0 Project Management Documents
1.1.1.0.0.0.b Project Management Plan (PMP)
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

Acquisition Plan FAR Part 7

Building Cx Guide

PMP Examples

PMP Template (PIP)

Feasibility 2.4.1.0.0.0.a

This page applies to:

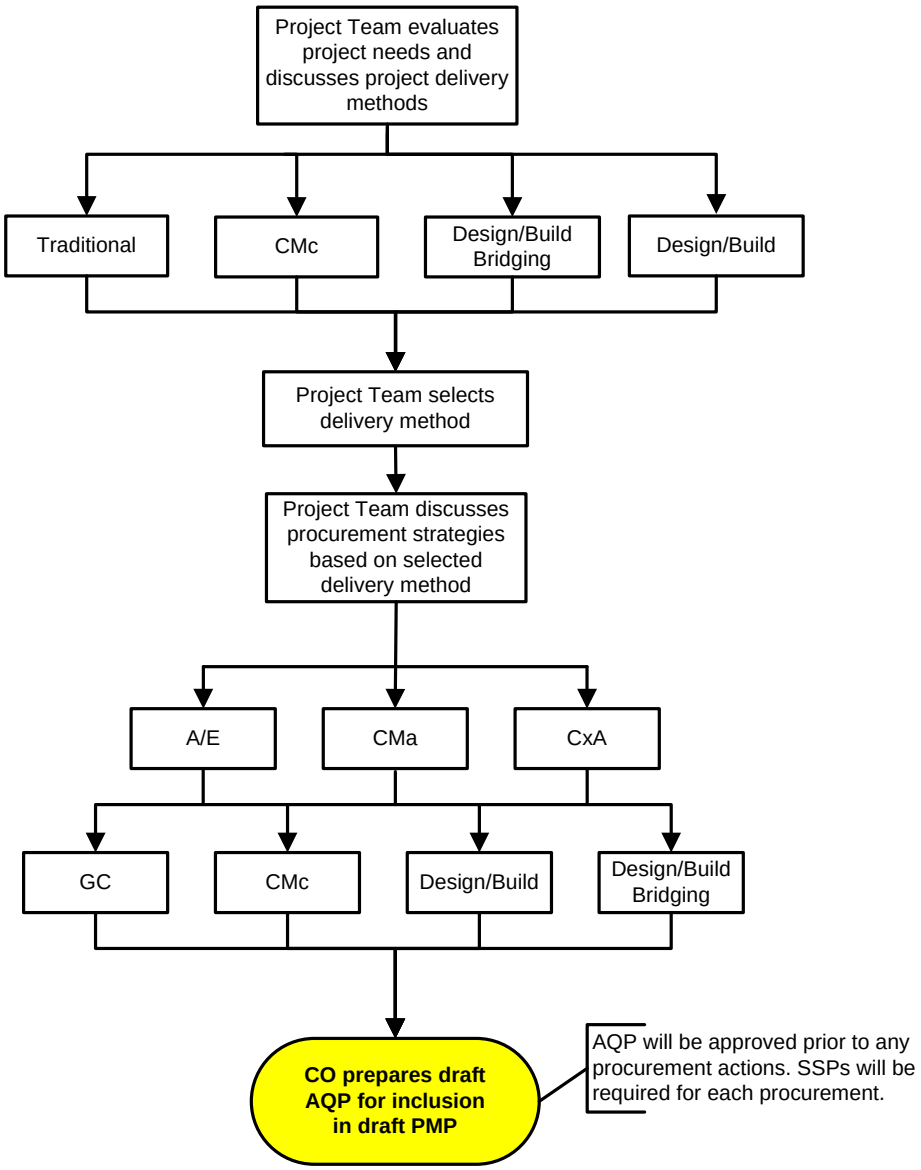
☑ Traditional ☑ D/B ☑ D/B-Bridging ☐ CMc

Project Updates in PIP 1.1.3.2.0.0

PMP
1.1.1.0.0.0.b

6.0.0.0.0.0 Design
Traditional
1.1.1.0.0.0.c Acquisition Plan Program/Project

1.0.0.0.0.0 Project Management Documents
1.1.1.0.0.0.c Acquisition Plan Program/ Project
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

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

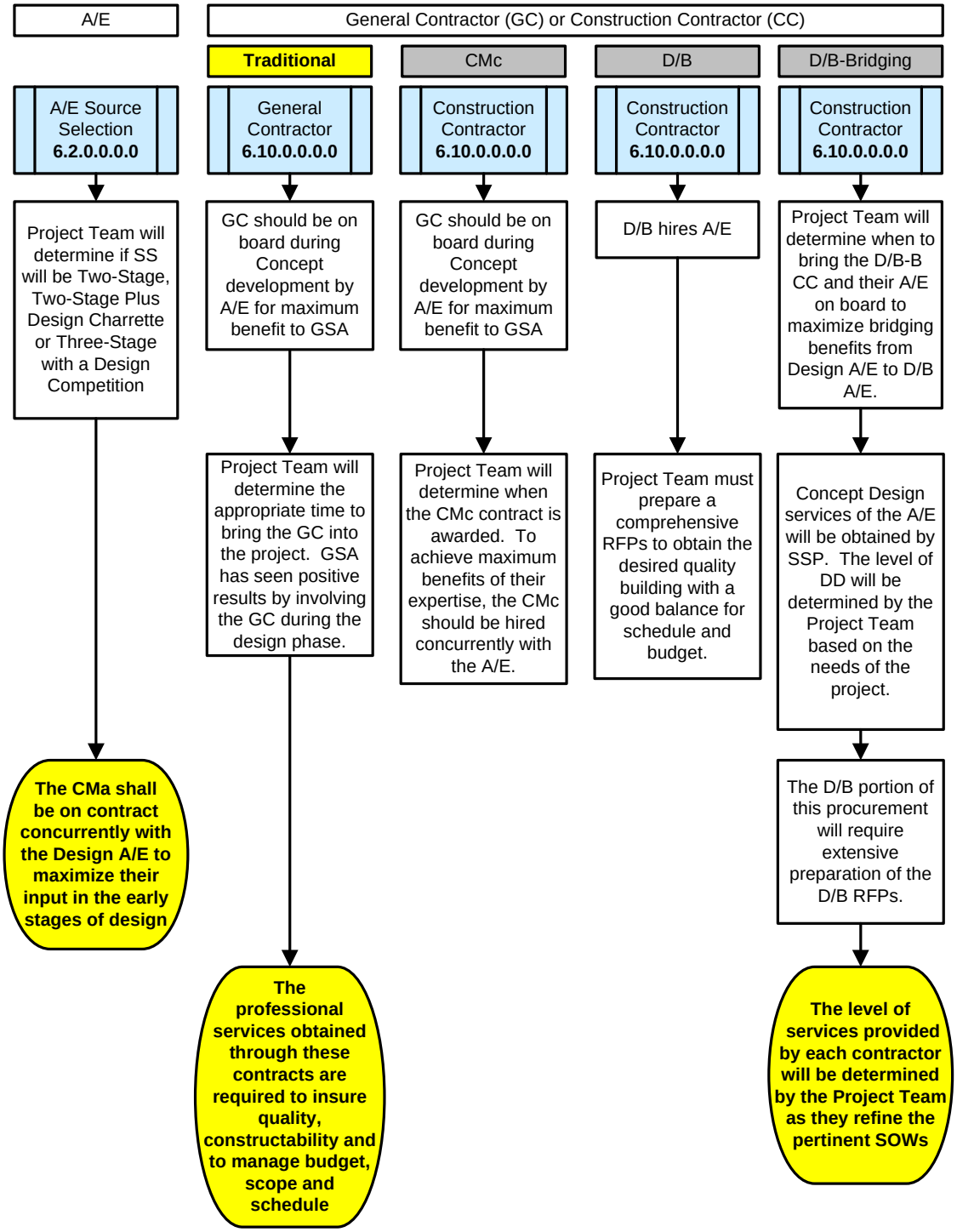
PMP
1.1.1.0.0.0.b

Source Selection Plan
6.4.2.0.0.0

1.0.0.0.0.0 Project Management Documents
Traditional
1.1.1.0.0.0.d Procurement Snapshot

1.0.0.0.0.0 Project Management Documents
1.1.1.0.0.0.d Procurement Snapshot
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

RECAP – CAPITAL CONSTRUCTION PROCUREMENTS
Apply Source Selection Procurement Procedures
Project Delivery Methods Are Highlighted as Follows:



Acquisition Plan 1.1.1.0.0.0.c

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

1.0.0.0.0.0 Project Management Documents
Traditional
1.1.1.0.0.0.e Procurement Snapshot (Continued)

1.0.0.0.0.0 Project Management Documents
1.1.1.0.0.0.e Procurement Snapshot (Continued)
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

REQUIRED PROFESSIONAL SERVICES FOR CAPITAL CONSTRUCTION PROJECTS:

Construction Manager as Agent (CMa)	Commissioning Agent (CxA)	Art-in-Architecture (AiA)	Other Specialty Consultants
Concurrent with A/E selection **6.3.1.0.0.0.a**	Concurrent with A/E selection **6.3.1.0.0.0.b**	Design Task Order concurrent with A/E NTP **6.1.0.0.0.0.b**	Project Team determines the need and timing. **6.1.0.0.0.0.a**
Project Team determines SOW required from the CMa and the level of services required in each Phase: Design Concepts, DDs, CDs, Construction Administration, through Start-up and Turnover	Project Team determines the level of Cx desired (considering timing of project and budget constraints). A complete Cx Plan is required for FY 2007 Design Starts.	The process is outlined in the Guide for AiA OCA Program managers are available on this sensitive program.	Procurement procedures apply. Specialty Consultants may be a separate contract or a part of other services provided by CMa, CMc, GC/CC.
		AiA Concept Design **6.7.14.0.1.0**	
		AiA Fabrication Task Order **7.1.4.0.0.0**	
		AiA Deliverable **7.1.12.0.0.0**	

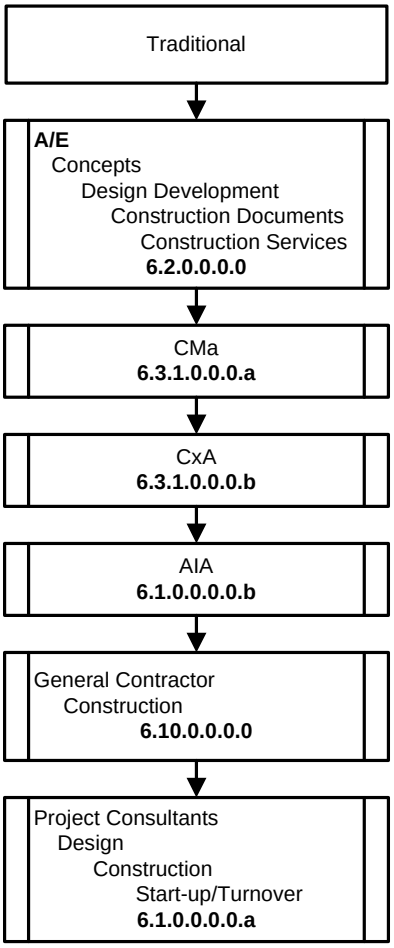
Project Team determines if Cx is a part of the SOW for the CMa or a separate CxA contract

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

Acquisition Plan 1.1.1.0.0.0.c

1.0.0.0.0.0.0 Project Management Documents
Traditional
1.1.1.0.0.0.f Procurement Recap

1.0.0.0.0.0.0 Project Management Documents
1.1.1.0.0.0.f Procurement Recap
2.0.0.0.0.0.0 Planning
3.0.0.0.0.0.0 Authorization/ Funding
4.0.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0.0 Design/Build
6.0.0.0.0.0.0 Design
7.0.0.0.0.0.0 Construction
8.0.0.0.0.0.0 Tenant Occupancy



This page applies to:

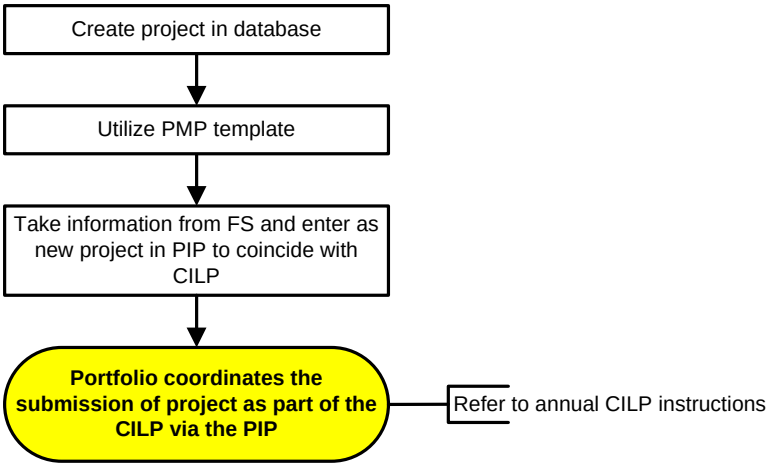
☑ Traditional ☐ D/B ☐ D/B-Bridging ☐ CMc

Acquisition Plan 1.1.1.0.0.0.c

Project Coordination 1.1.0.0.0.0.a

1.0.0.0.0.0 Project Management Documents
Traditional
1.1.3.1.0.0 Initiate Project in PIP

1.0.0.0.0.0 Project Management Documents
1.1.3.1.0.0 Initiate Project in PIP
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

Project Coordination 1.1.0.0.0.0.a

This page applies to:

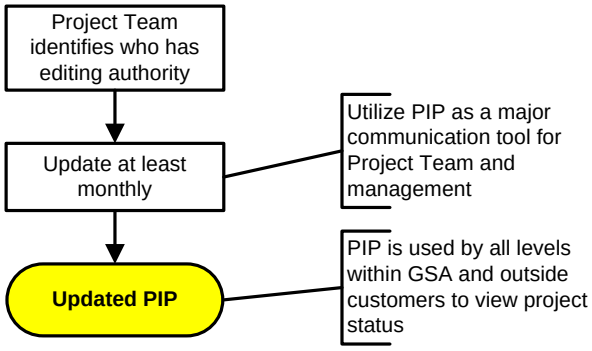
☑ Traditional ☑ D/B ☑ D/B-Bridging ☑ CMc

Project Updates in PIP 1.1.3.2.0.0

Feasibility
2.4.1.0.0.0.a

1.0.0.0.0.0.0 Project Management Documents
Traditional
1.1.3.2.0.0 Project Updates in PIP

1.0.0.0.0.0.0 Project Management Documents
1.1.3.2.0.0 Project Updates in PIP
2.0.0.0.0.0.0 Planning
3.0.0.0.0.0.0 Authorization/ Funding
4.0.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0.0 Design/Build
6.0.0.0.0.0.0 Design
7.0.0.0.0.0.0 Construction
8.0.0.0.0.0.0 Tenant Occupancy



LINKS

Initiate Project in PIP
1.1.3.1.0.0

This page applies to:

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

Project Coordination
1.1.0.0.0.0.a

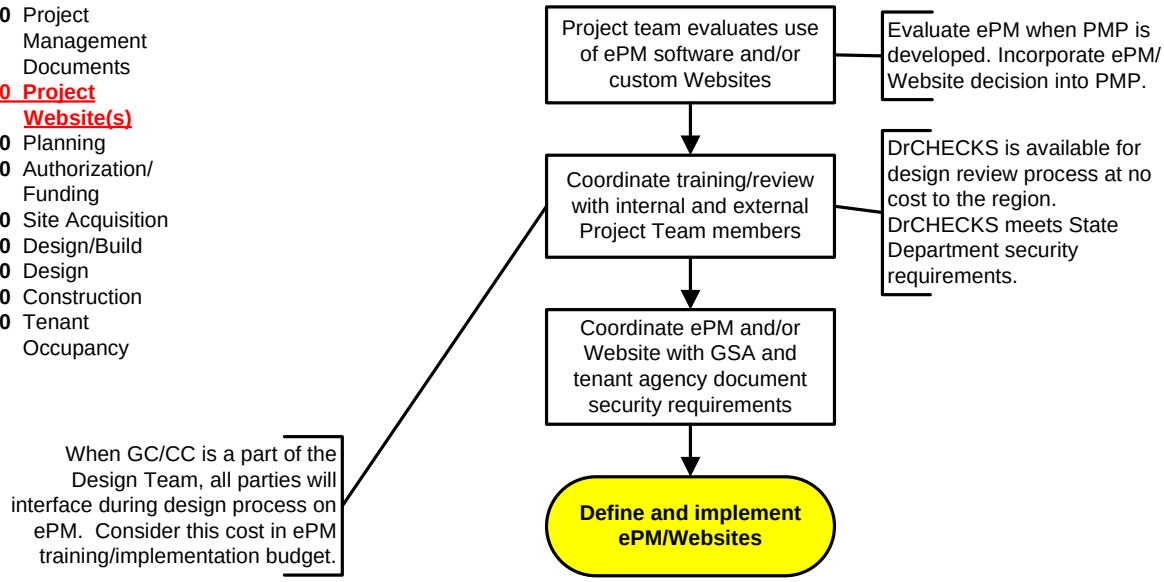
Project Coordination 1.1.0.0.0.0.a

1.0.0.0.0.0 Project Management Documents

Traditional

1.1.5.0.0.0 Project Website(s)

1.0.0.0.0.0 Project Management Documents
1.1.5.0.0.0 Project Website(s)
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

DrCHECKS

GSA Document Security Requirements

This is for sensitive but not classified documents

NISPOM (Classified Documents)

This page applies to:

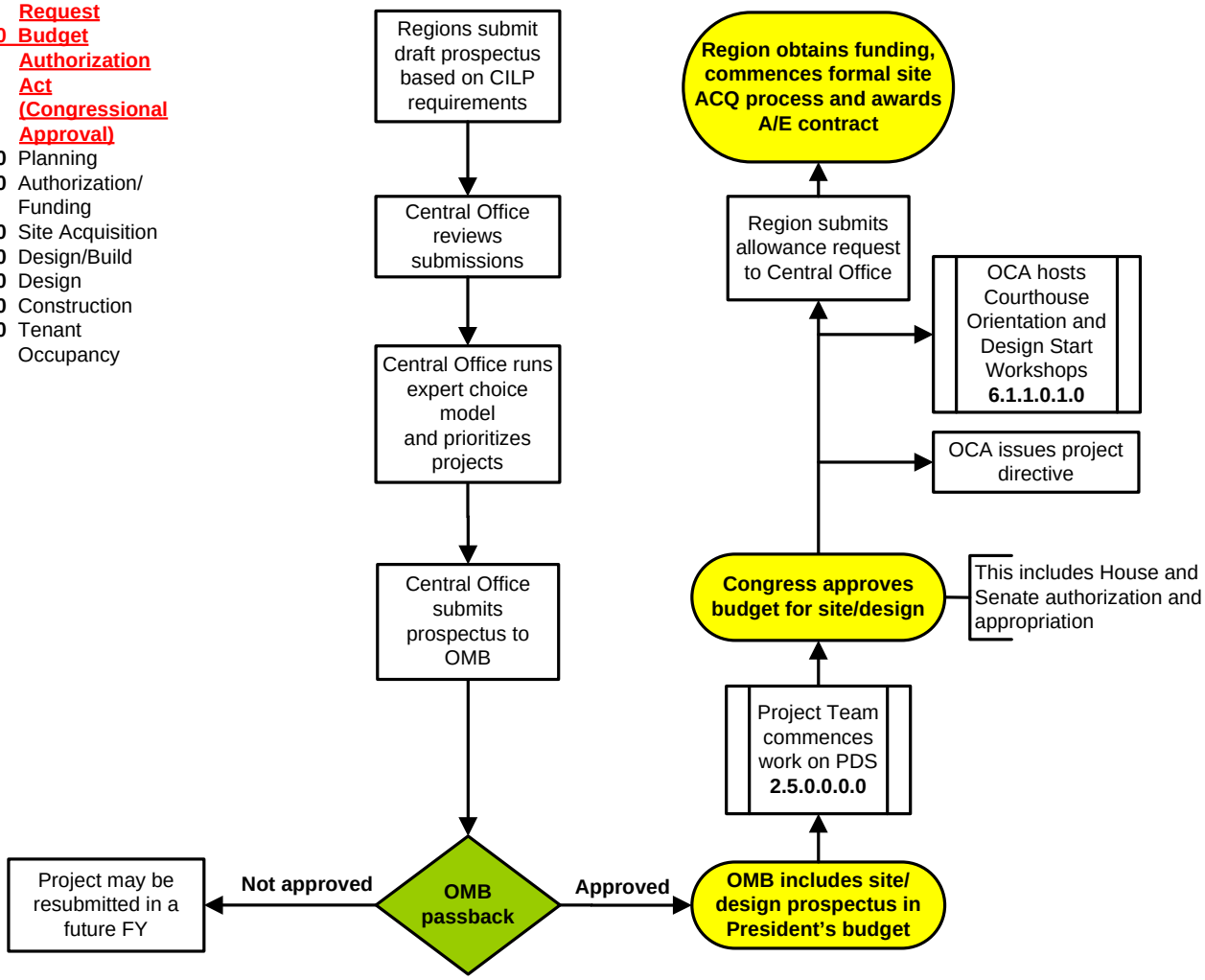
☑ Traditional ☑ D/B ☑ D/B-Bridging ☑ CMc

Project Coordination 1.1.0.0.0.0.a

Feasibility
2.4.1.0.0.0.a

3.0.0.0.0.0.0 Authorization/Funding
Traditional
2.4.4.0.0.0.0 Project Funding Request
3.4.5.0.0.0.0 Budget Authorization Act (Congressional Approval)

1.0.0.0.0.0.0 Project Management Documents
2.4.4.0.0.0.0 Project Funding Request
3.4.5.0.0.0.0 Budget Authorization Act (Congressional Approval)
2.0.0.0.0.0.0 Planning
3.0.0.0.0.0.0 Authorization/ Funding
4.0.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0.0 Design/Build
6.0.0.0.0.0.0 Design
7.0.0.0.0.0.0 Construction
8.0.0.0.0.0.0 Tenant Occupancy



Site Acquisition
4.0.0.0.0.0.a

A/E Procurement (Overview)
6.2.0.0.0.0

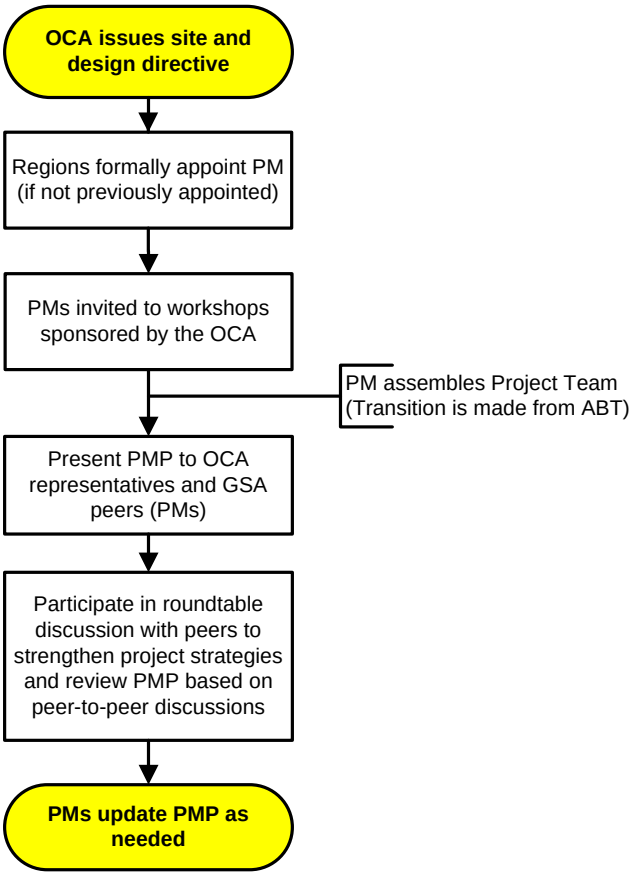
This page applies to:

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

Project Funding Request 2.4.4.0.0.0

1.0.0.0.0.0 Project Management Documents
Traditional
6.1.1.0.1.0 Courthouse Orientation and Design Start Workshop

1.0.0.0.0.0 Project Management Documents
6.1.1.0.1.0 Courthouse Orientation and Design Start Workshop
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

Project Coordination 1.1.0.0.0.0.a

This page applies to:

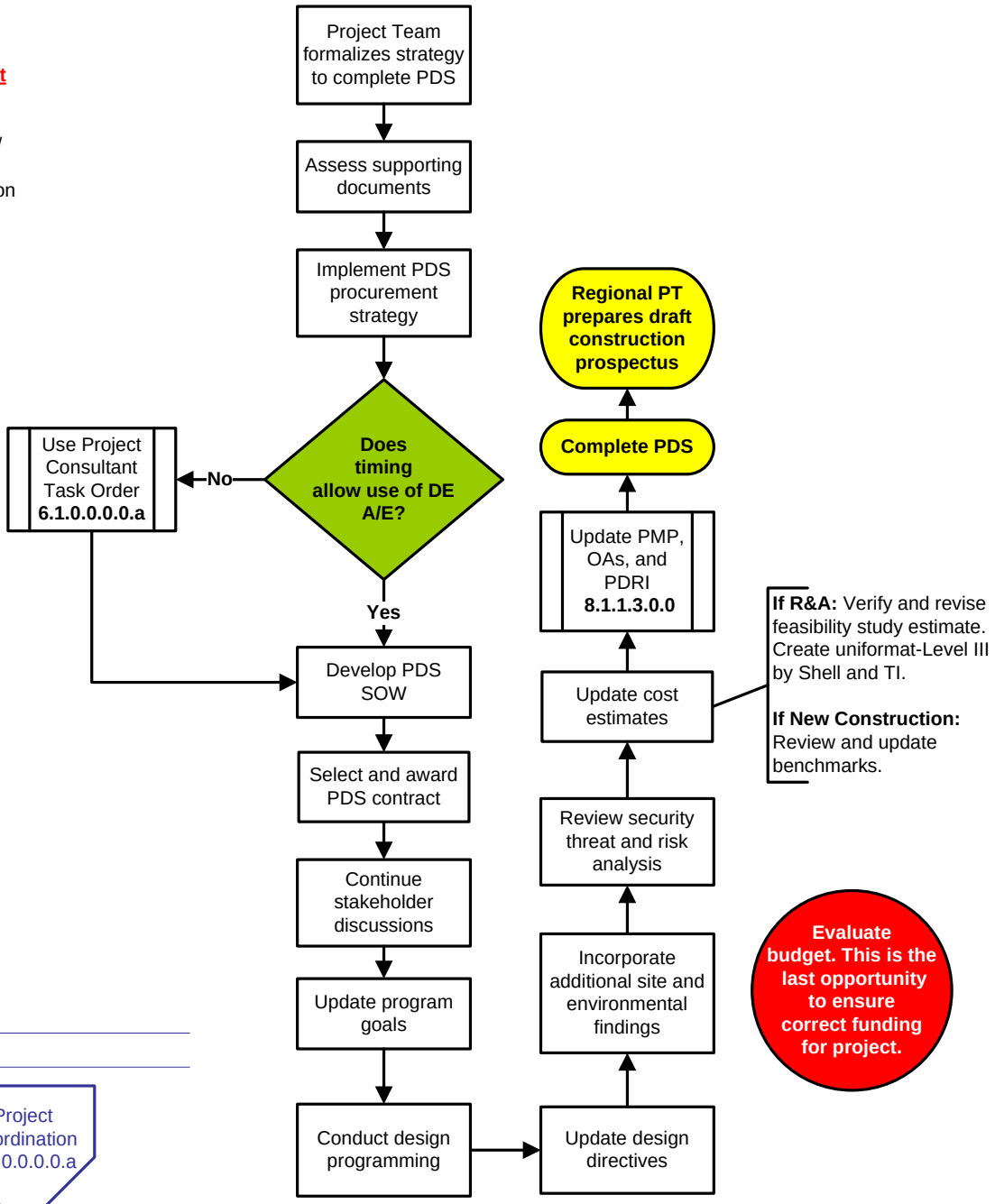
☑ Traditional ☑ D/B ☑ D/B-Bridging ☑ CMc

PMP 1.1.1.0.0.0.b

2.5.0.0.0.0 Program Development Study (PDS)

A/E Procurement (Overview) 6.2.0.0.0.0

1.0.0.0.0.0 Project Management Documents
2.5.0.0.0.0 Program Development Study (PDS)
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

Project Planning Guide (PPG)

Project Coordination 1.1.0.0.0.0.a

Pre-Project (Preliminary) Planning 2.1.0.0.0.1

Feasibility 2.4.1.0.0.0.a

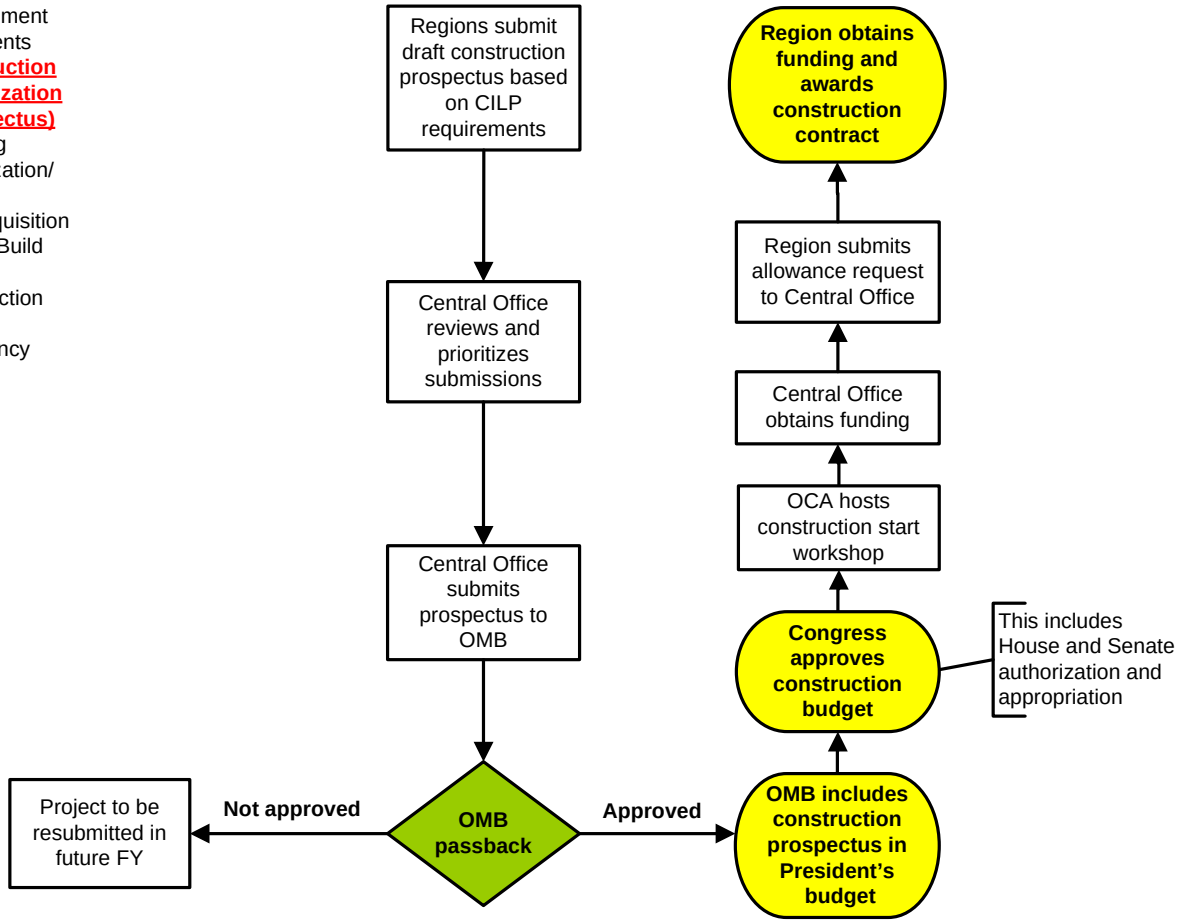
This page applies to:

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

Construction Authorization (Prospectus) 3.4.0.0.0.0

3.0.0.0.0.0 Authorization/Funding
Traditional
3.4.0.0.0.0 Construction Authorization (Prospectus)

1.0.0.0.0.0 Project Management Documents
3.4.0.0.0.0 Construction Authorization (Prospectus)
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



This page applies to:

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

Construction Procurement
6.10.0.0.0.0

6.0.0.0.0.0 Design
Traditional
6.0.0.0.0.0 Design

Construction Authorization (Prospectus) 3.4.0.0.0.0

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

Site Investigation Tasks for FS **4.0.0.0.0.0.b**

Site Acquisition **4.0.0.0.0.0.a**

A/E Procurement (Overview) **6.2.0.0.0.0**

CMa/ Commissioning Authority (Cx) Services **6.3.0.0.0.0**

CMa SOW **6.3.1.0.0.0.a**

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

AiA Contract **6.1.0.0.0.0.b**

Project Consultant Task Order **6.1.0.0.0.0.a**

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**

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

GC Procurement commences when contract drawings are complete

LINKS

FAR | GSA Guidebook I – Acquisition of Real Property | GSAM

This page applies to:

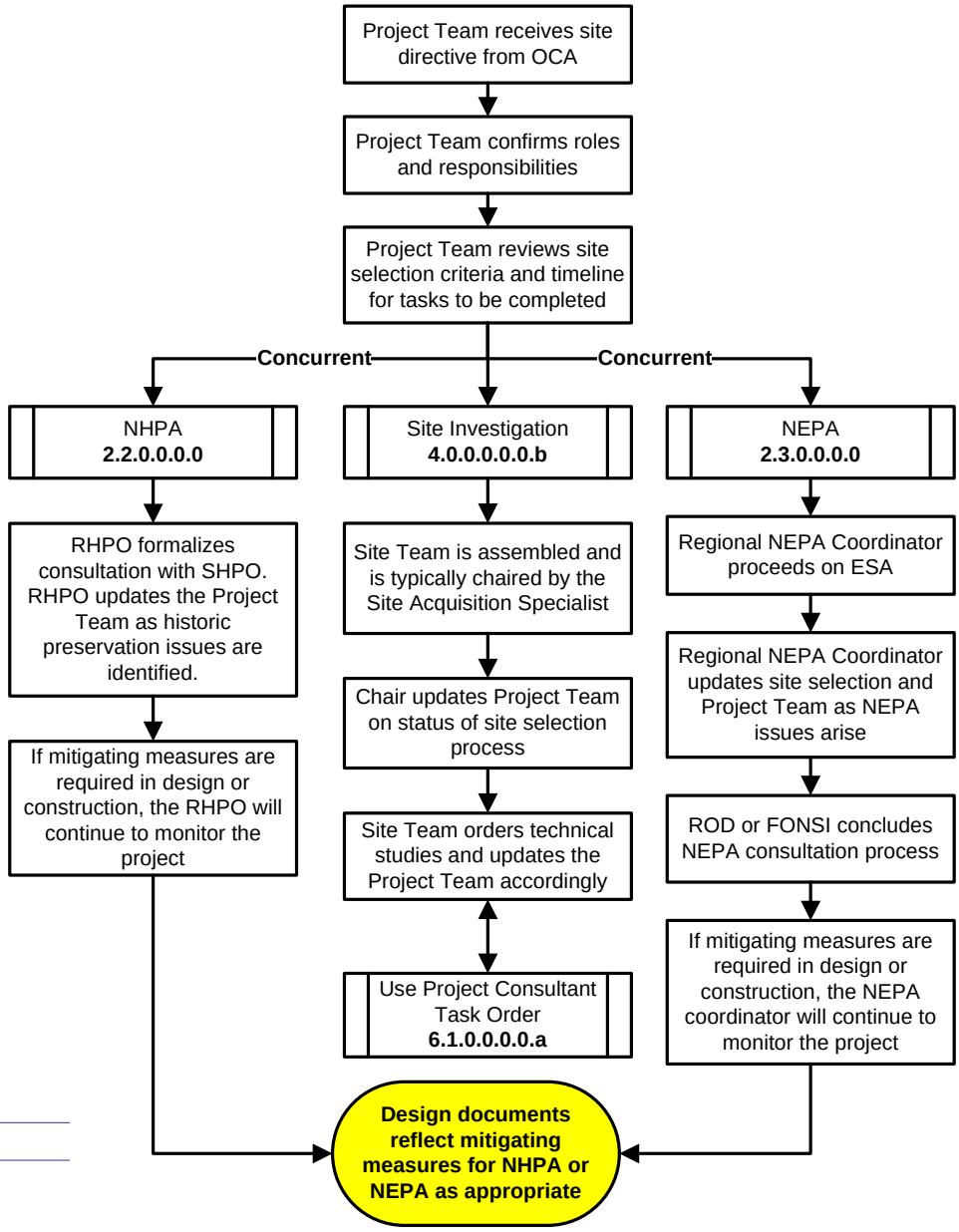
☑ Traditional ☐ D/B ☑ D/B-Bridging ☑ CMc

Site Selection/ Technical Studies NHPA and NEPA Process (Overview) 4.1.0.0.0.0

Design
6.0.0.0.0.0

6.0.0.0.0.0 Design
Traditional
4.1.0.0.0.0 Site Selection/Technical Studies: NHPA and NEPA Process (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
4.1.0.0.0.0 Site Selection/ Technical Studies NHPA and NEPA Process (Overview)
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 Selection includes complex compliance issues to include but not be limited to EOs, NEPA, NHPA, Due Diligence, NAGPRA, CERCLA, et al. Special technical studies are typically required for site evaluation/cost impacts. Project Team must rely upon regional/national specialists to address this complex process.

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

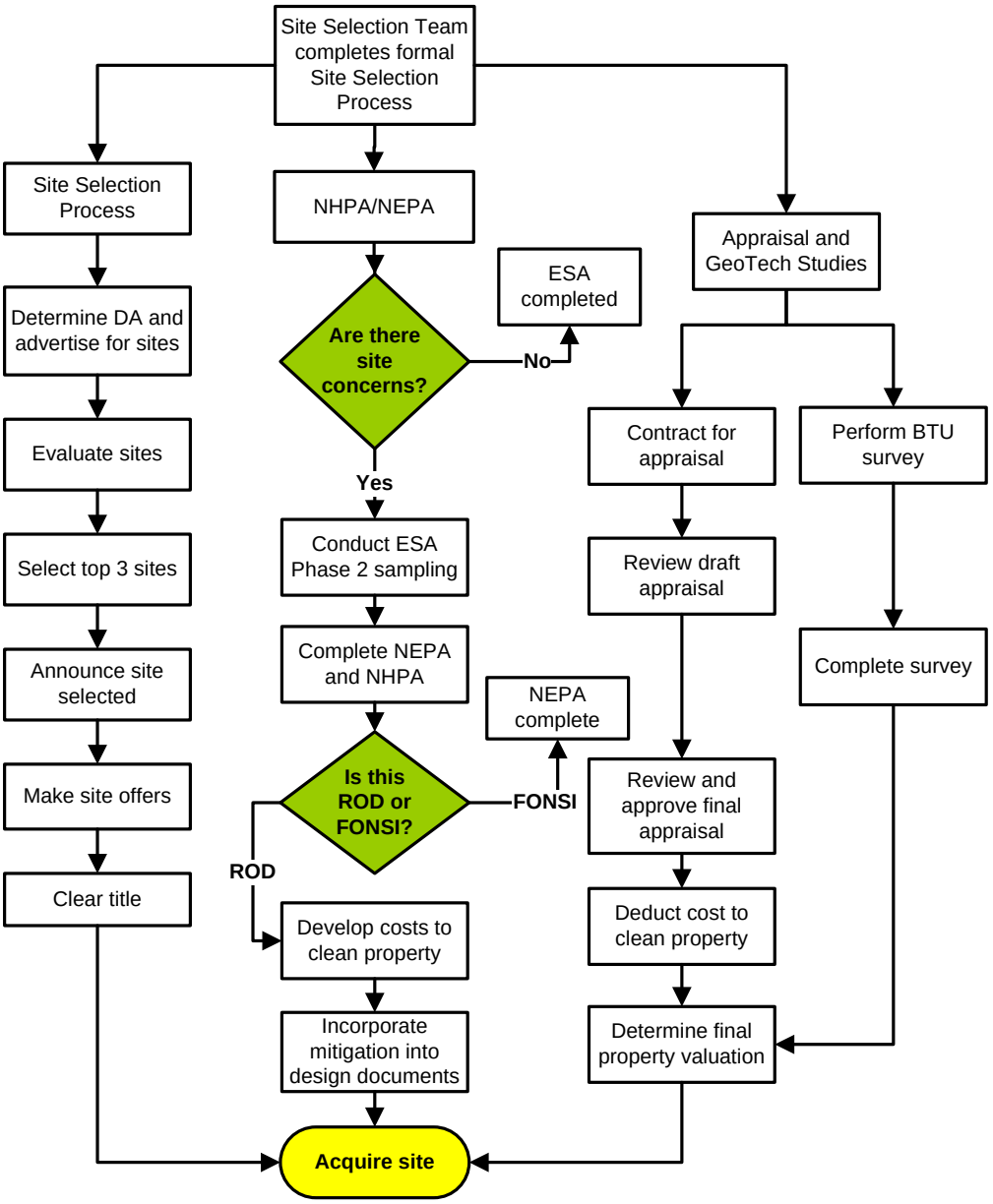
This page applies to:

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

Site Acquisition (Overview) 4.2.0.0.0.0

6.0.0.0.0 Design
Traditional
4.2.0.0.0 Site Acquisition (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
4.2.0.0.0 Site Acquisition (Overview)
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



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

Construction Award cannot occur without clear title to site

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 2.6.0.0.0.0

This page applies to:

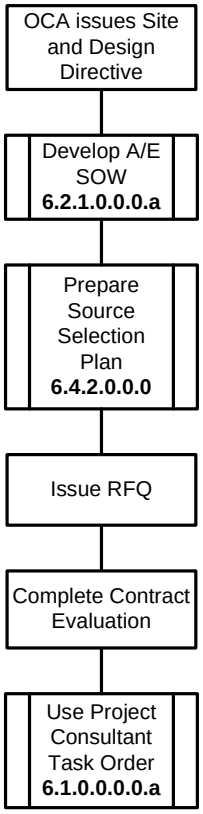
☑ Traditional ☐ D/B ☑ D/B-Bridging ☑ CMc

A/E Procurement (Overview) 6.2.0.0.0.0

6.2.0.0.0.0 A/E Procurement (Overview)

Site Selection/ Technical Studies NHPA and NEPA Process (Overview) 4.1.0.0.0.0

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
6.2.0.0.0.0 A/E Procurement (Overview)
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy



LINKS

FS | PDS | PMP Reference

A/E Source Selection/ Evaluation Process 6.2.2.0.0.0

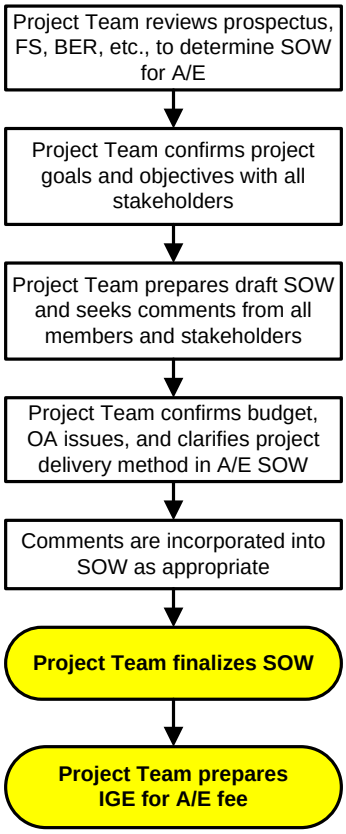
This page applies to:

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

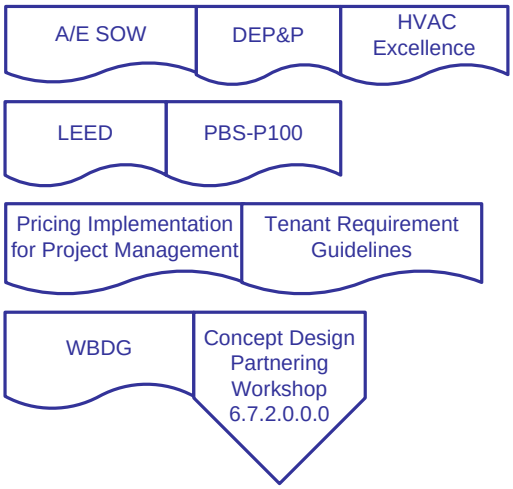
A/E Services SOW (Overview) 6.2.1.0.0.0.a

6.0.0.0.0.0 Design
Traditional
6.2.1.0.0.0.a 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.a A/E Services Scope of Work (Overview)
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy



LINKS



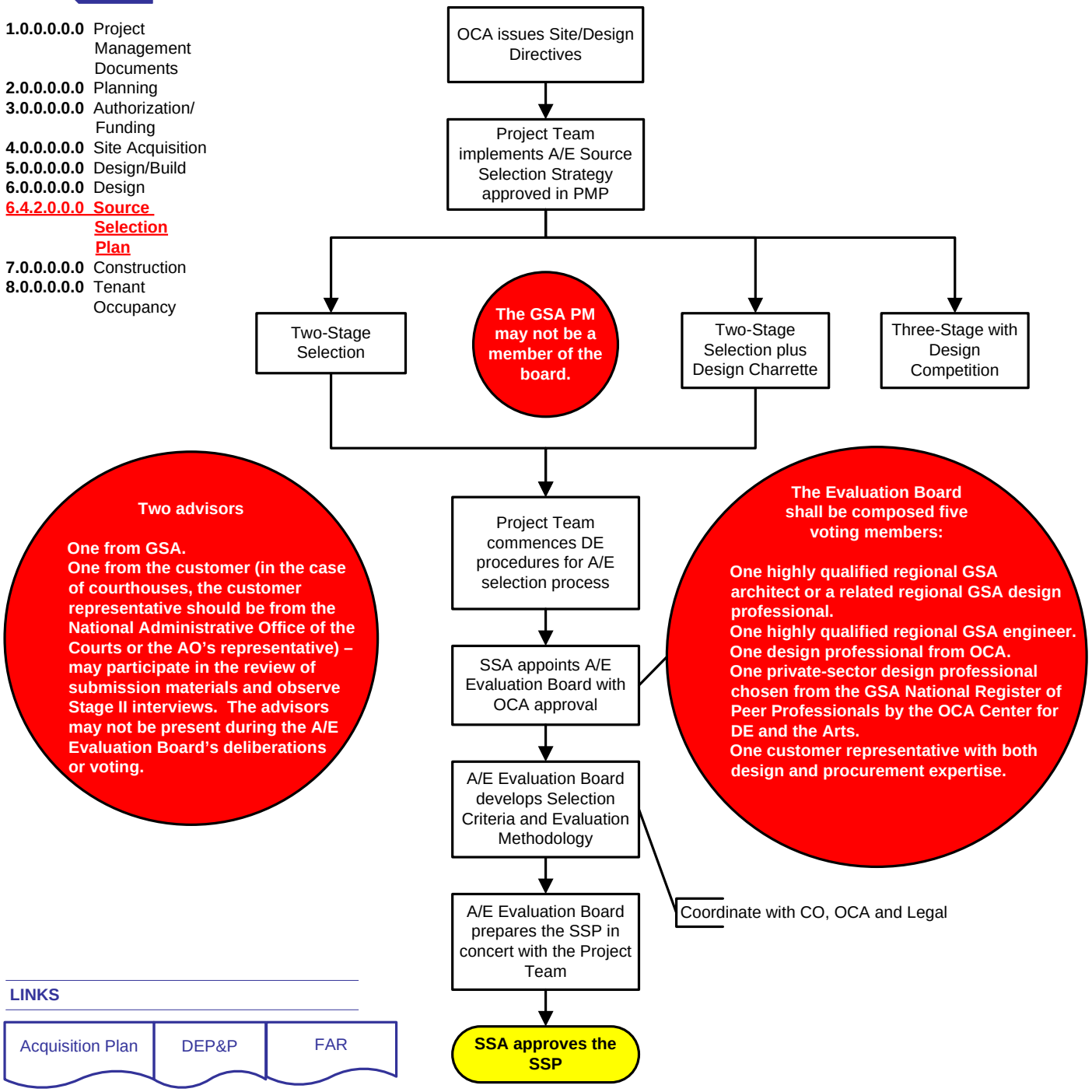
This page applies to:

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

Source Selection Plan 6.4.2.0.0.0

6.0.0.0.0.0 Design
Traditional
6.4.2.0.0.0 Source Selection Plan

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
3.0.0.0.0.0 Authorization/ Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design/Build
6.0.0.0.0.0 Design
6.4.2.0.0.0 Source Selection Plan
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy



LINKS

Acquisition Plan | DEP&P | FAR

GSAM | PIP template for PMP | PMP Examples

Samples of Selection Plans

This page applies to:

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

A/E Source Selection/ Evaluation Process 6.2.2.0.0.0

Source Selection Plan 6.4.2.0.0.0

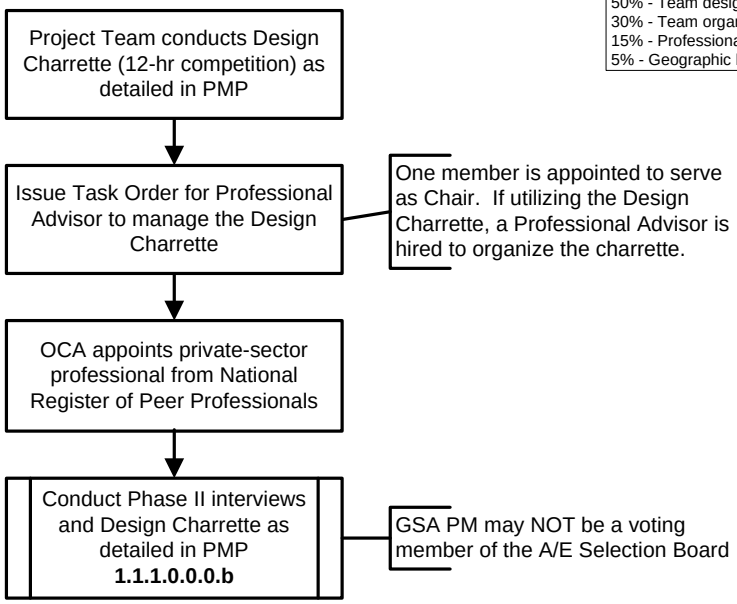
6.0.0.0.0.0 Design
Traditional
6.2.1.0.0.0.b Design Charrette (Optional)

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.b Design Charrette (Optional)
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy

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

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

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

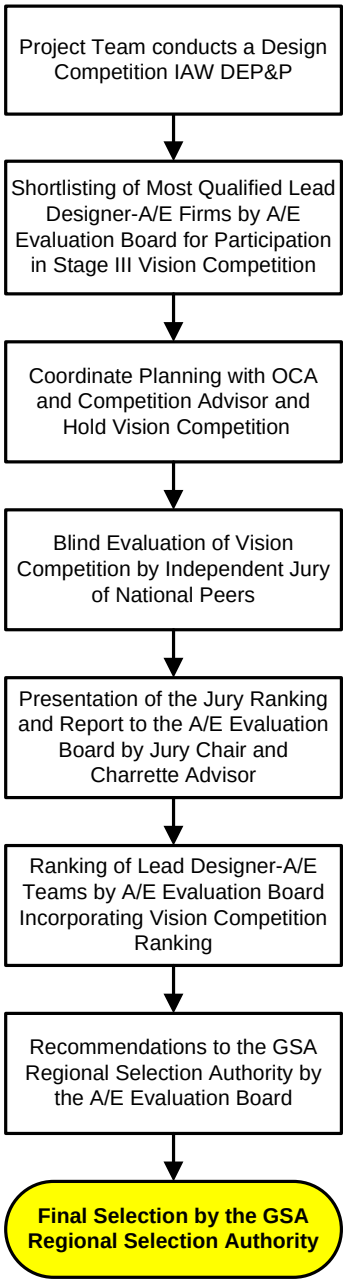


This page applies to:
☑ Traditional ☐ D/B ☑ D/B-Bridging ☑ CMc

A/E Source Selection/ Evaluation Process 6.2.2.0.0.0

6.0.0.0.0.0 Design
Traditional
6.2.1.0.0.0.c 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



LINKS

DEP&P

This page applies to:

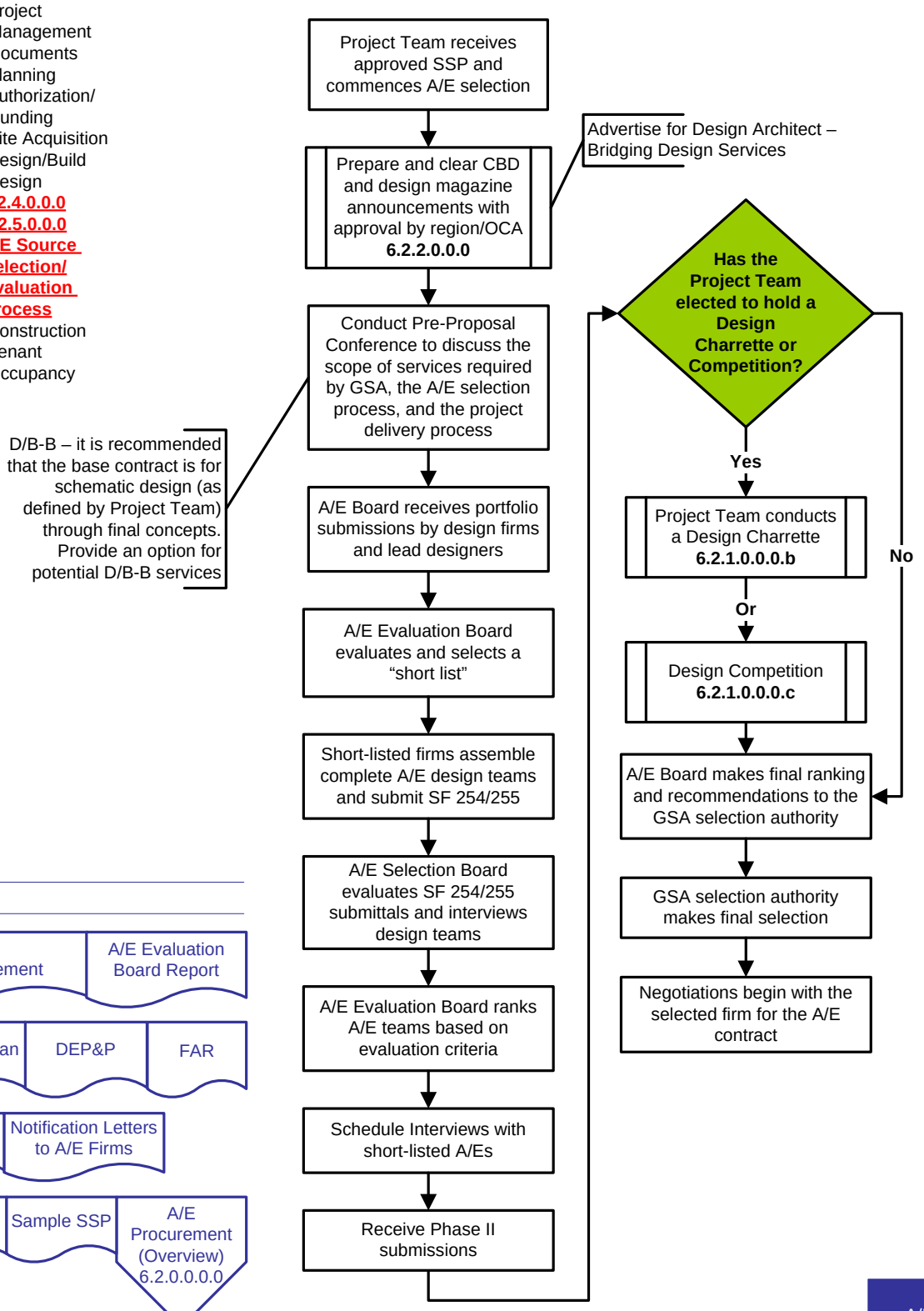
☑ Traditional ☐ D/B ☑ D/B-Bridging ☑ CMc

A/E Contract for Design 6.2.6.0.0.0

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

Source Selection Plan 6.4.2.0.0.0

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



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:

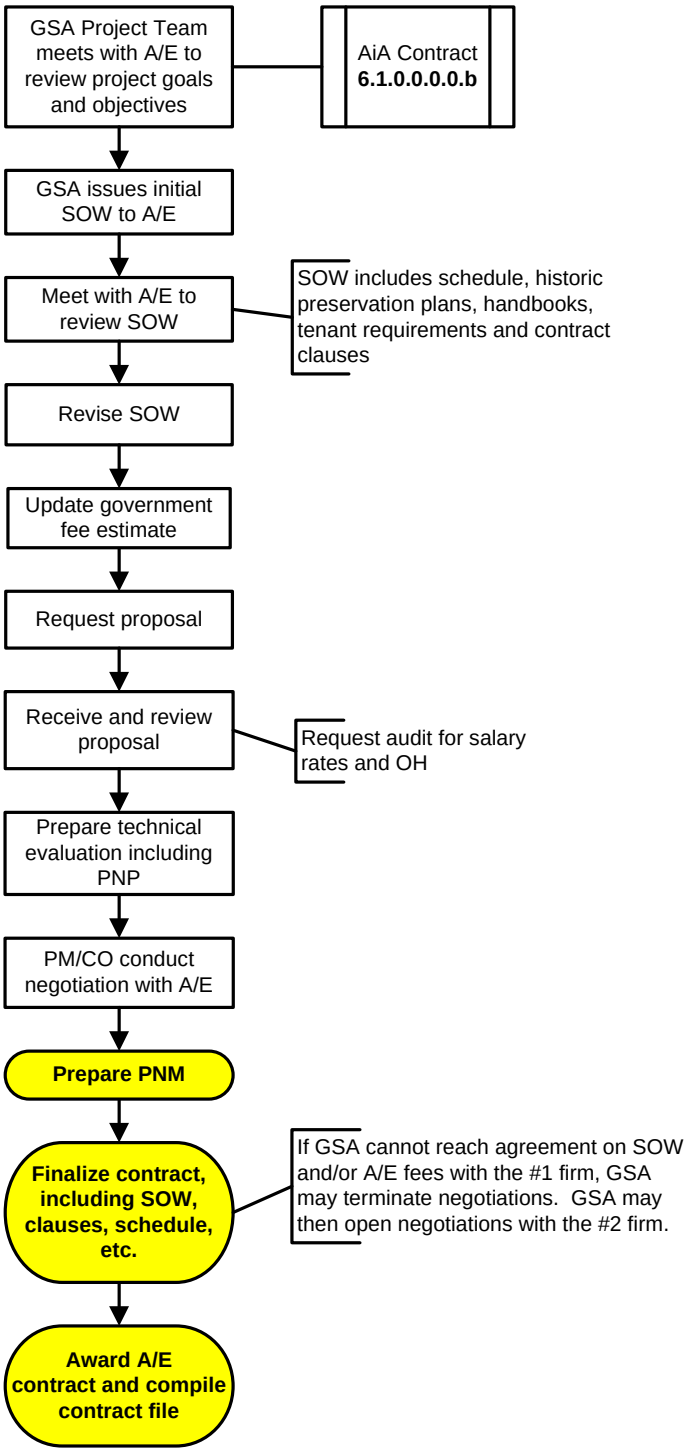
☑ Traditional ☐ D/B ☑ D/B-Bridging ☑ CMc

A/E Contract for Design 6.2.6.0.0.0

6.2.6.0.0.0 A/E Contract for Design

A/E Source Selection/ Evaluation Process 6.2.2.0.0.0

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
6.2.6.0.0.0 A/E Contract for Design
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy



LINKS

Sample PNM | Sample PNP | A/E Procurement (Overview) 6.2.0.0.0.0

This page applies to:

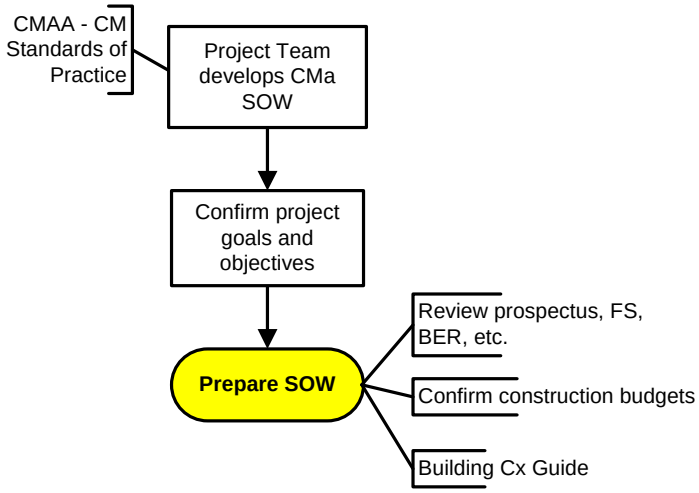
☑ Traditional ☐ D/B ☑ D/B-Bridging ☑ CMc

CMa/ Commissioning Authority (Cx) Services 6.3.0.0.0.0

6.3.1.0.0.0.a CMa Scope of Work

CMa Commissioning Authority(Cx) Services 6.3.0.0.0.0

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



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

LINKS

CMAA Standards | DEP&P

HVAC Excellence | LEED | PBS-P100

Pricing Implementation for Project Management | SOW Examples

This page applies to:

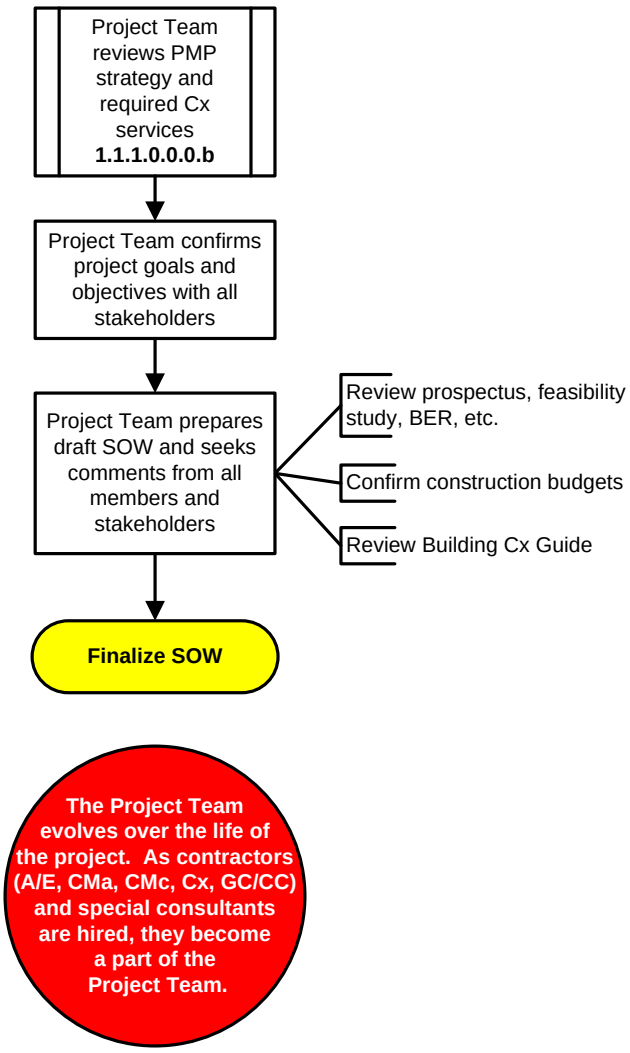
☑ Traditional ☑ D/B ☑ D/B-Bridging ☑ CMc

CMa Task Order/CxA Task Order 6.3.2.0.0.0

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

CMa Task Order/CxA Task Order 6.3.2.0.0.0

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



LINKS

Building Cx Guide | DEP&P | HVAC Excellence

LEED | PBS-P100

Pricing Implementation for Project Management | SOW Examples

This page applies to:

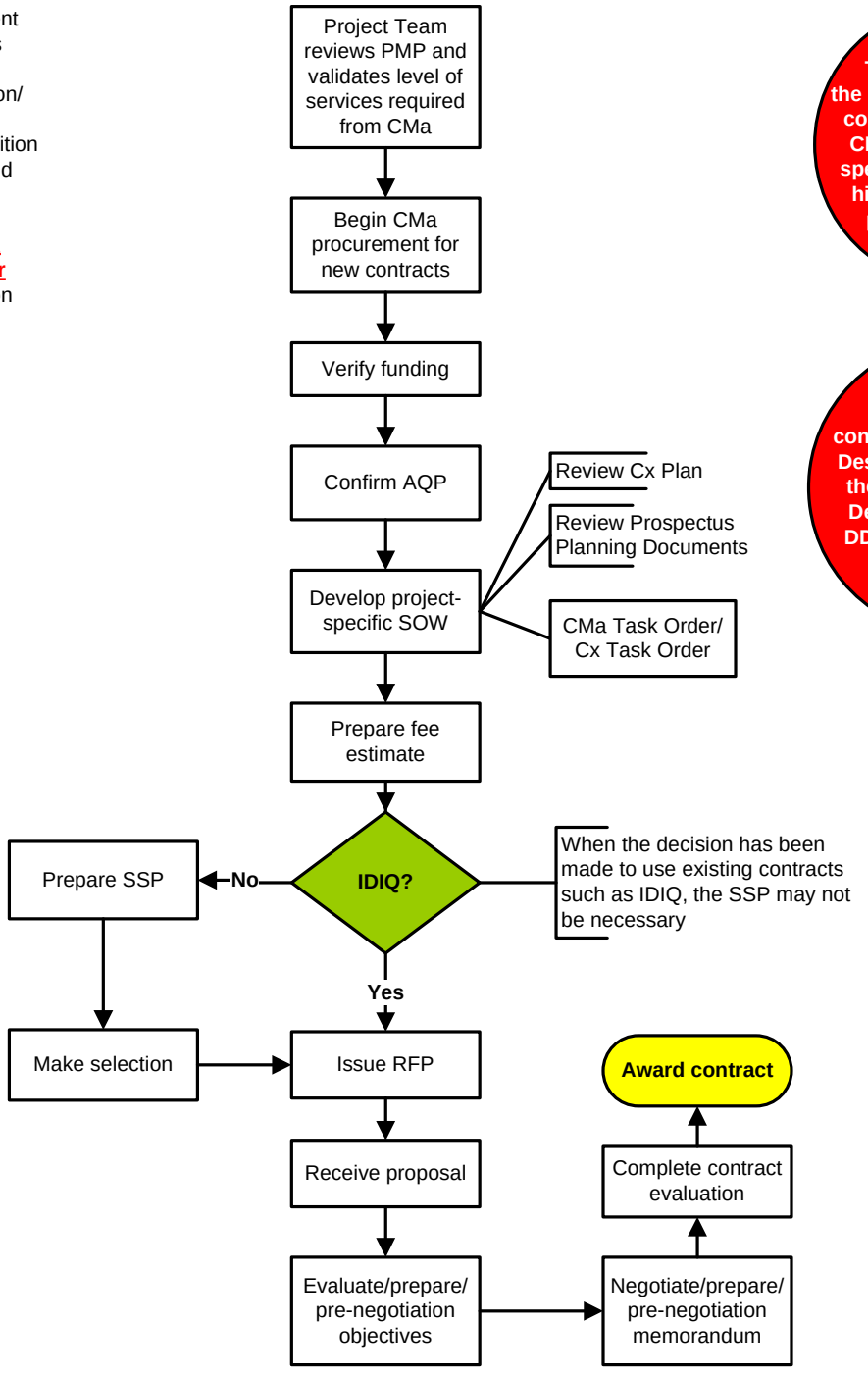
☑ Traditional ☑ D/B ☑ D/B-Bridging ☑ CMc

CMa SOW 6.3.1.0.0.0.a

6.3.2.0.0.0 CMa Task Order/ CxA Task Order

CMa SOW 6.3.1.0.0.0.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



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

FS | PDS | PMP Reference

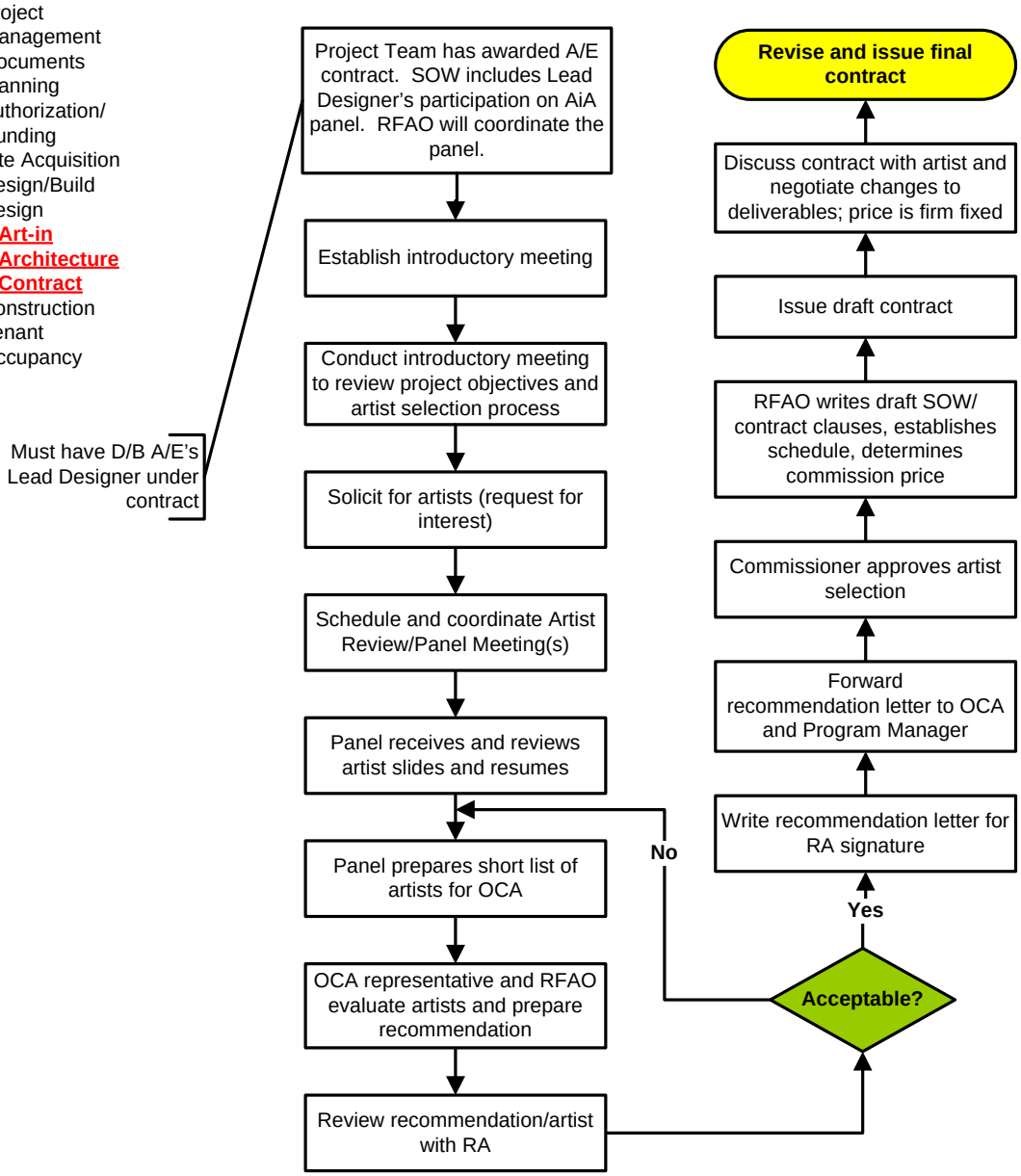
This page applies to:

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

CxA SOW (if apart from CMa) 6.3.1.0.0.0.b

6.0.0.0.0.0 Design
Traditional
6.1.0.0.0.0.b Art-in-Architecture Contract

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
3.0.0.0.0.0 Authorization/ Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design/Build
6.0.0.0.0.0 Design
6.1.0.0.0.0.b Art-in Architecture Contract
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy



LINKS

Fine Arts Desk Guide

This page applies to:

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

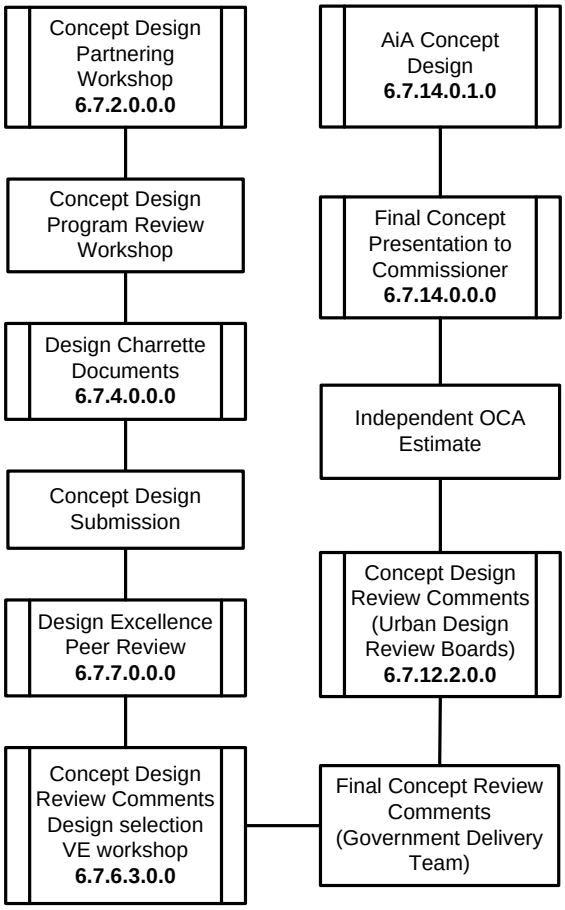
Concept Design (Overview) 6.7.0.0.0.0

AiA Contract 6.1.0.0.0.b

6.0.0.0.0 Design
Traditional
6.7.0.0.0 Concept Design (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
6.7.0.0.0 Concept Design (Overview)
7.0.0.0.0 Construction
8.0.0.0.0 Tenant Occupancy

Some processes may be concurrent



This page applies to:

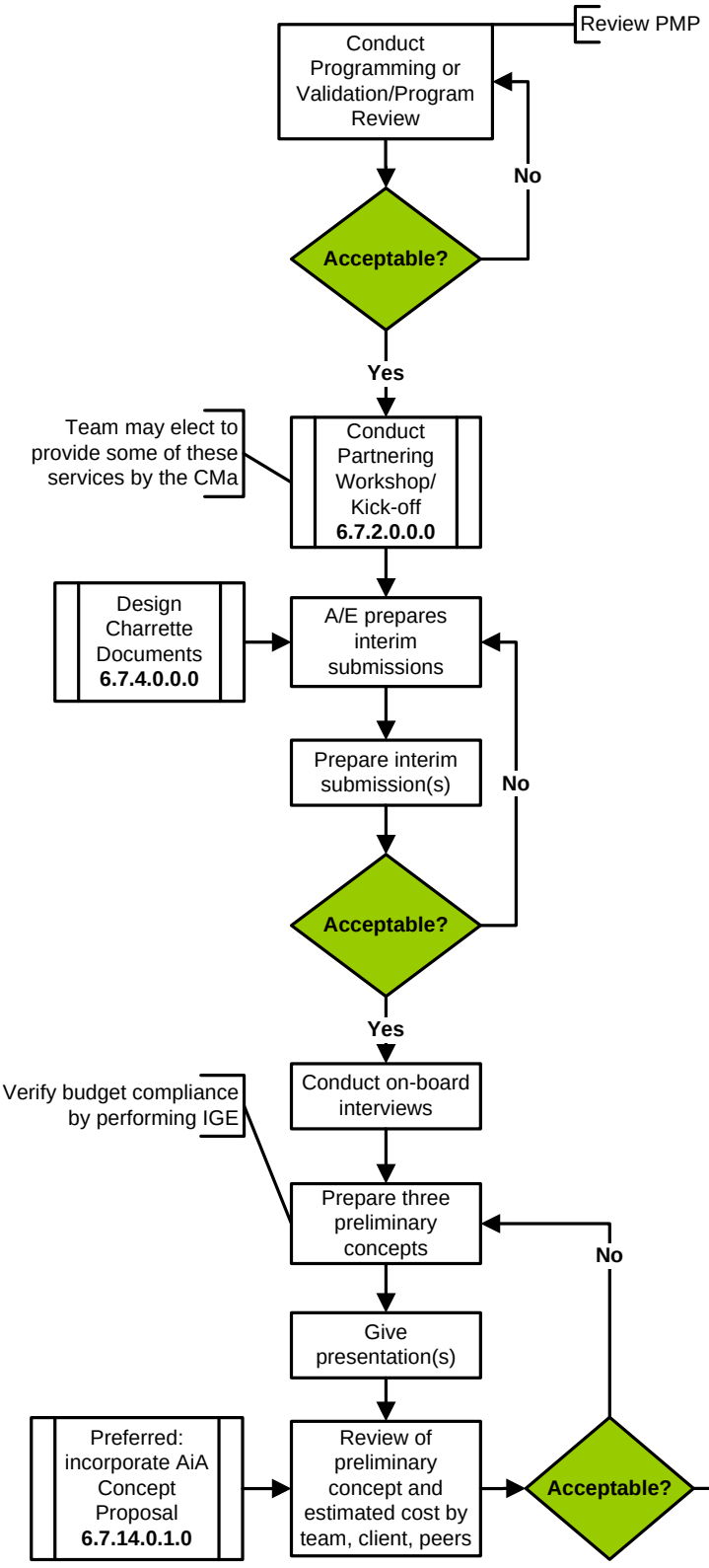
☑ Traditional ☐ D/B ☑ D/B-Bridging ☑ CMc

Concept Design 6.7.0.0.0.1.a

Concept Design (Overview) 6.7.0.0.0.0

6.0.0.0.0.0 Design
Traditional
6.7.0.0.0.1.a Concept Design

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



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

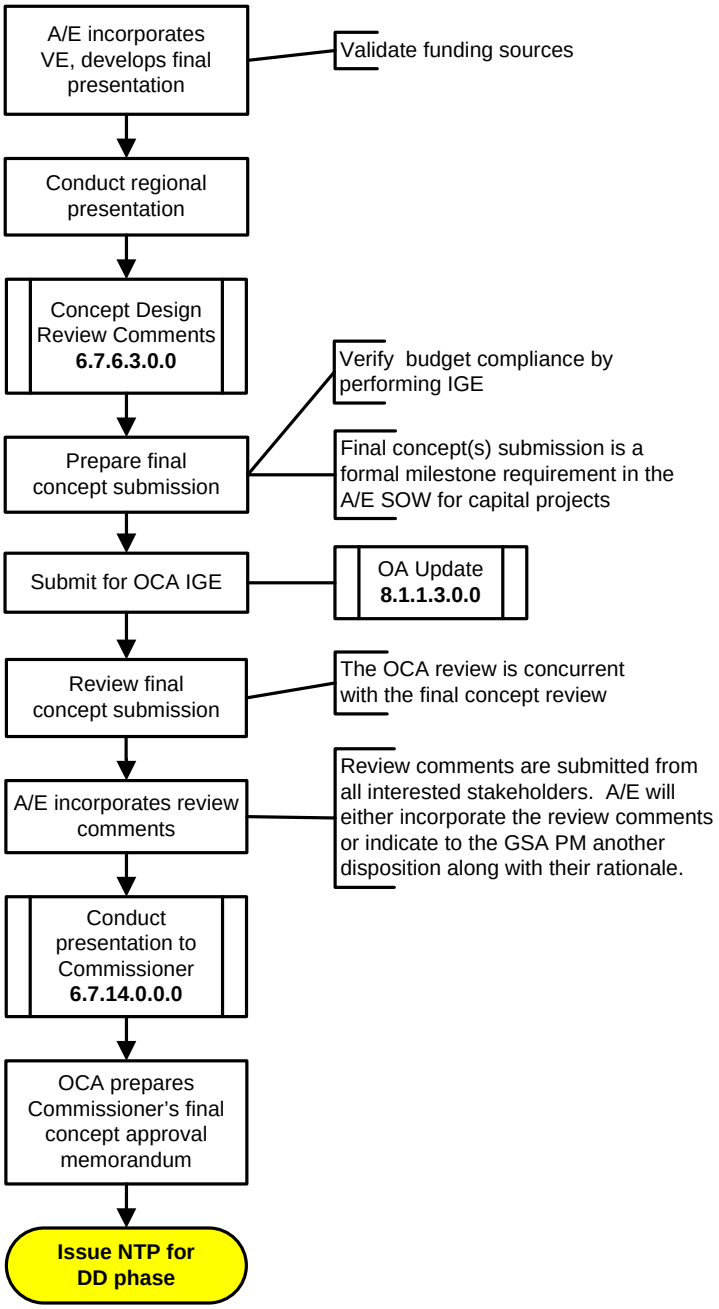
Concept Design (Continued) 6.7.0.0.0.1.b

6.7.0.0.0.1.b Concept Design (Continued)

Concept Design 6.7.0.0.0.1.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
6.7.0.0.0.1.b Concept Design (Continued)
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy

Use Agency Design Guides



LINKS

Design Review Checklist | DrCHECKS | LEED 20 EB Requirements

PBS-P100 | PBS Pricing Desk Guide | PDRI

A/E Services SOW (Overview) 6.2.1.0.0.0.a

This page applies to:

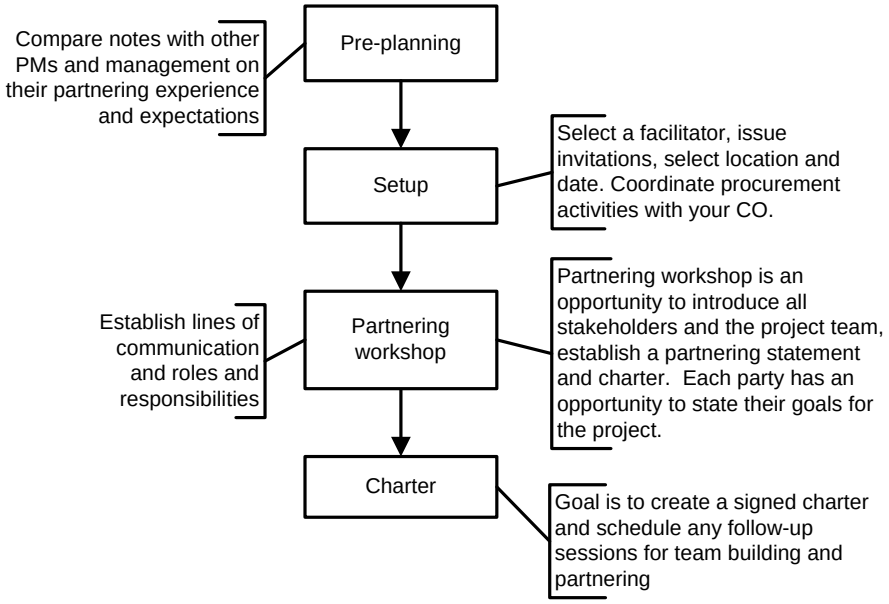
☑ Traditional ☐ D/B ☑ D/B-Bridging ☑ CMc

Concept Design Partnering Workshop 6.7.2.0.0.0

Concept Design (Continued) 6.7.0.0.0.1.b

6.7.2.0.0.0 Concept Design Partnering Workshop

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
3.0.0.0.0.0 Authorization/ Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design/Build
6.0.0.0.0.0 Design
6.7.2.0.0.0 Concept Design Partnering Workshop
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy



LINKS

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

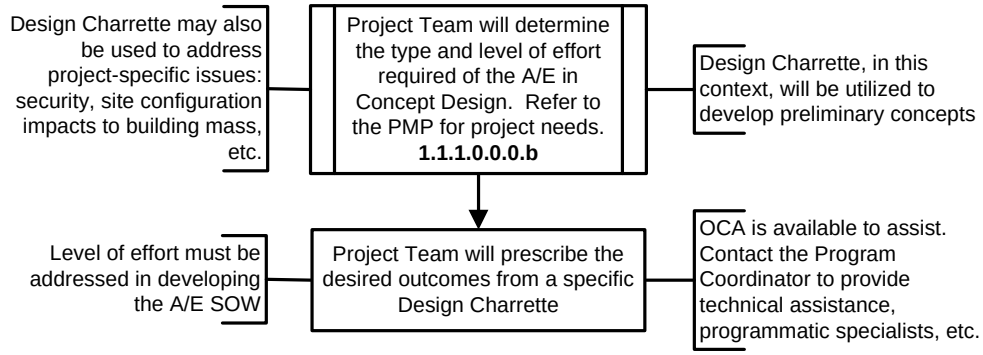
This page applies to:

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

Design Charrette Documents 6.7.4.0.0.0

6.0.0.0.0.0 Design
Traditional
6.7.4.0.0.0 Design Charrette Documents

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



LINKS

DEP&P

This page applies to:

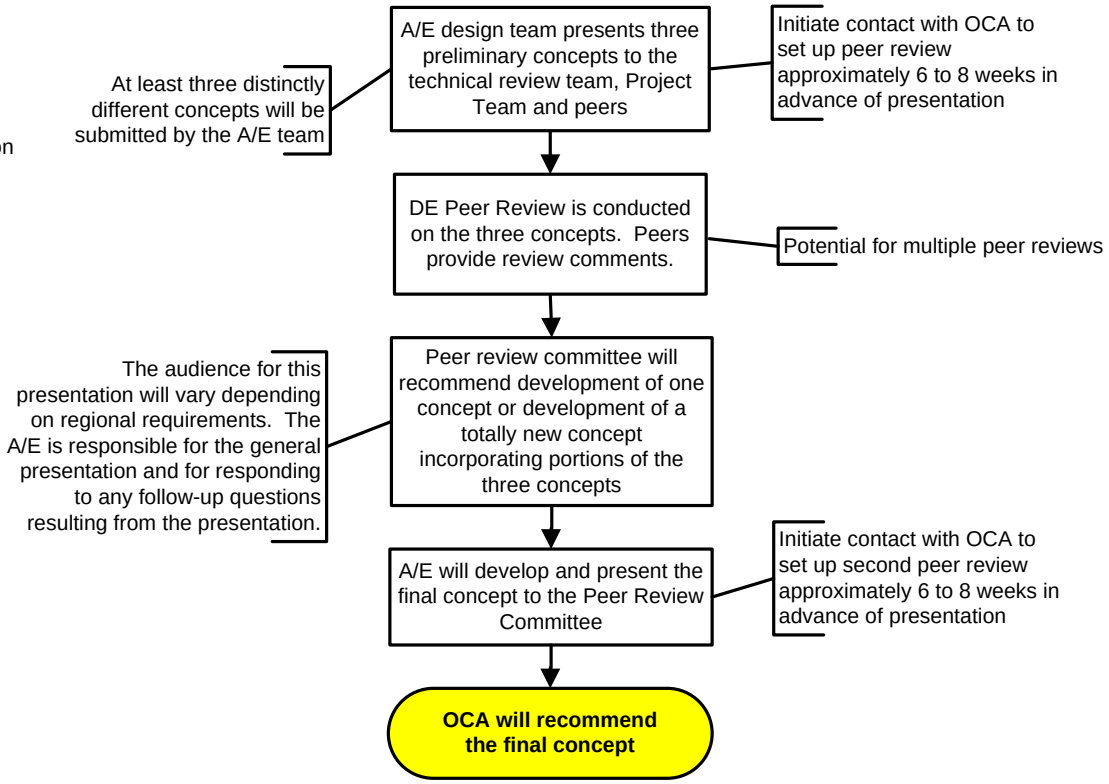
☑ Traditional ☐ D/B ☑ D/B-Bridging ☑ CMc

Design Excellence Peer Review 6.7.7.0.0.0

6.7.7.0.0.0 Design Excellence Peer Review

Design Charrette Documents 6.7.4.0.0.0

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
3.0.0.0.0.0 Authorization/ Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design/Build
6.0.0.0.0.0 Design
6.7.7.0.0.0 Design Excellence Peer Review
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy



LINKS

A/E SOW

Concept Design Partnering Workshop 6.7.2.0.0.0

Concept Design Review Comments Including Concept Design and VE Workshop 6.7.6.3.0.0

This page applies to:

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

Concept Design 6.7.0.0.0.1.a

6.7.6.3.0.0 Concept Design Review Comments Including Concept Design Selection and 6.7.9.0.0.0 VE Workshop

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
3.0.0.0.0.0 Authorization/ Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design/Build
6.0.0.0.0.0 Design
6.7.6.3.0.0 Concept Design Review Comments Including Concept Design Selection and 6.7.9.0.0.0 VE Workshop)
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy

A/E prepares/distributes interim submission

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.

Project Team reviews submissions and submits comments

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

A/E responds to review comments

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

A/E incorporates review comments into next submission

Project Team selects final Concept Design

Project Team hosts VE workshop on selected Design Concept applying VE and LCC best practices detailed in PBS-P100

Project Team may include GC if they are on board

On-board reviews are usually informal and discretionary. They are conducted to check the progress status of various disciplines. Attendees will vary depending upon issues to be reviewed. Separate breakout sessions by discipline, e.g., fire protection, mechanical, electrical, architectural, may be effective.

LINKS

A/E SOW | DEP&P | Design Review Checklist

DrCHECKS | PBS-P100 - Appendix | Submission Checklist

Concept Design Partnering Workshop 6.7.2.0.0.0

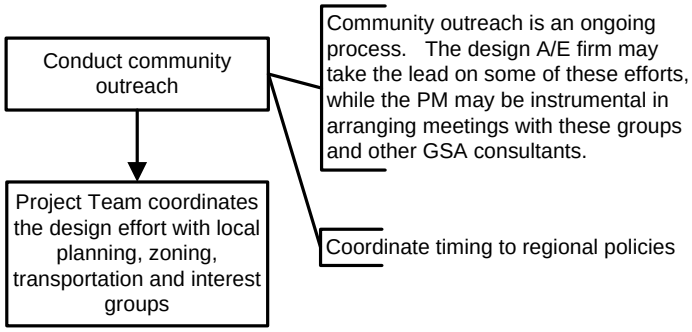
This page applies to:

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

Concept Design (Continued) 6.7.0.0.0.1.b

6.0.0.0.0.0 Design
Traditional
6.7.12.2.0.0 Concept Design Review Comments (Urban Design Review Boards)

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
3.0.0.0.0.0 Authorization/ Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design/Build
6.0.0.0.0.0 Design
6.7.12.2.0.0 Concept Design Review Comments (Urban Design Review Boards)
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy



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:

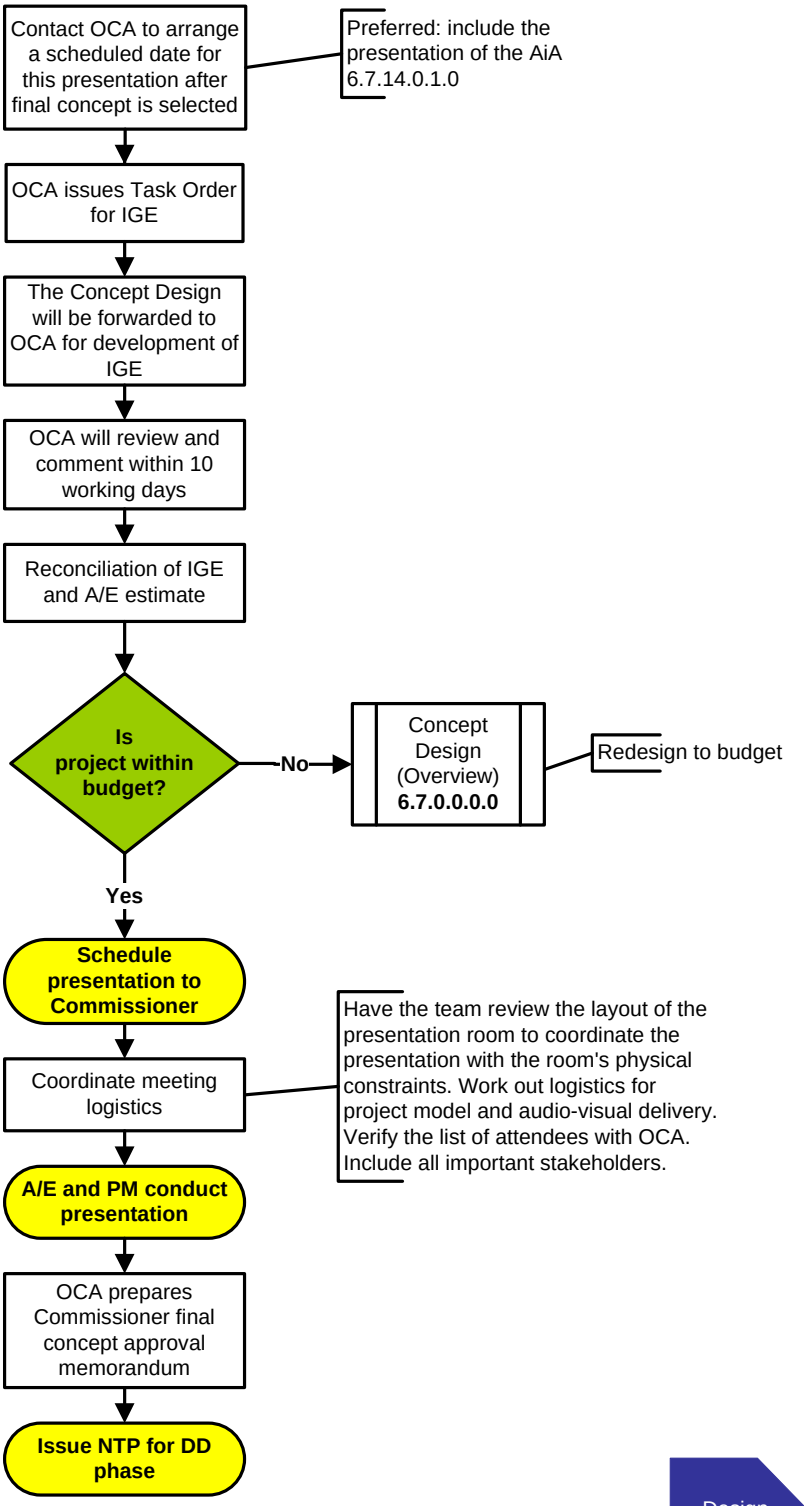
☑ Traditional ☑ D/B ☑ D/B-Bridging ☑ CMc

Final Concept Presentation to Commissioner 6.7.14.0.0.0

Concept Design Review Comments (Urban Design Review Boards) 6.7.12.2.0.0

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

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



LINKS

PBS-P100
Concept Design Partnering Workshop 6.7.2.0.0.0

This page applies to:

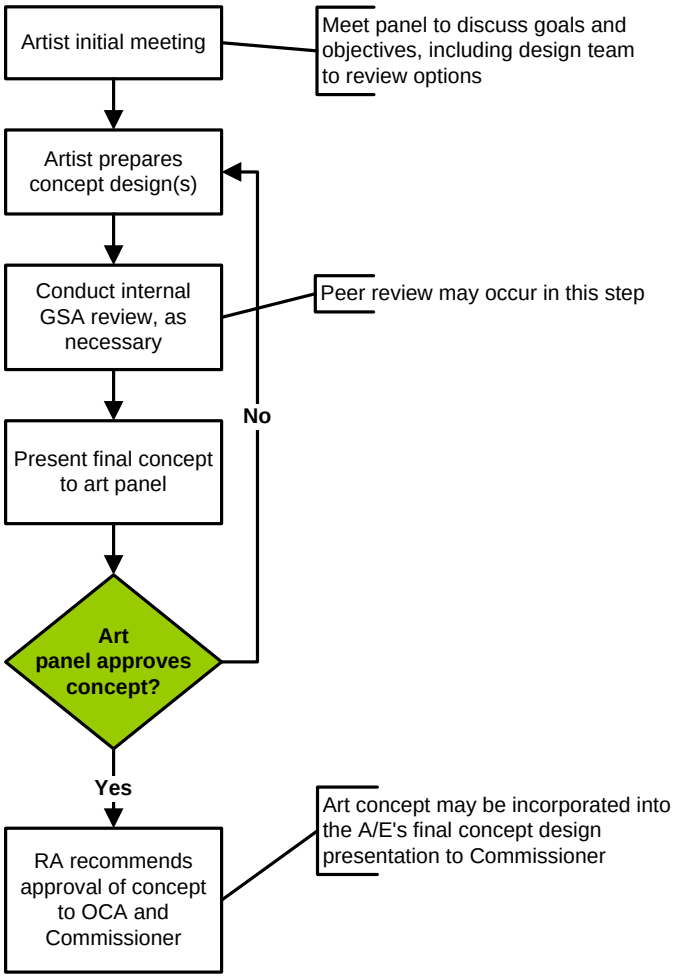
☑ Traditional ☐ D/B ☑ D/B-Bridging ☑ CMc

Design Development (Overview) 6.8.0.0.0.0

6.7.14.0.1.0 Art-in-Architecture Concept Design

Final Concept Presentation to Commissioner 6.7.14.0.0

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
3.0.0.0.0.0 Authorization/ Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design/Build
6.0.0.0.0.0 Design
6.7.14.0.1.0 Art-in-Architecture Concept Design
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy



LINKS

Concept Design Partnering Workshop 6.7.2.0.0.0

This page applies to:

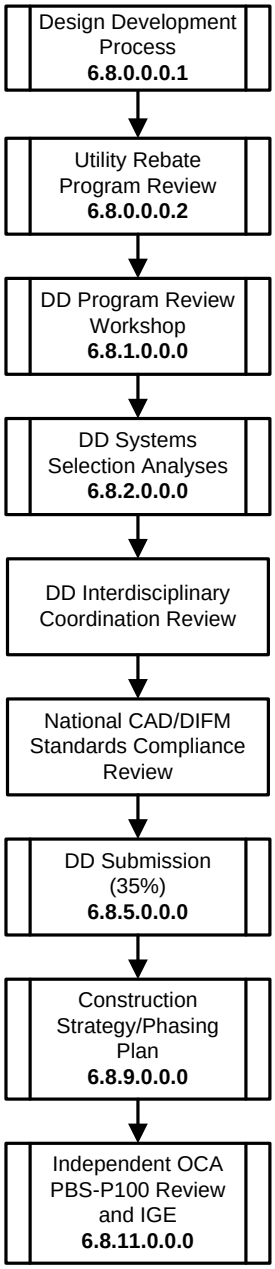
☑ Traditional ☐ D/B ☑ D/B-Bridging ☑ CMc

Design Development (Overview) 6.8.0.0.0.0

Concept Design (Overview) 6.7.0.0.0.0

6.0.0.0.0.0 Design
Traditional
6.8.0.0.0.0 Design Development (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
6.8.0.0.0.0 Design Development (Overview)
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy



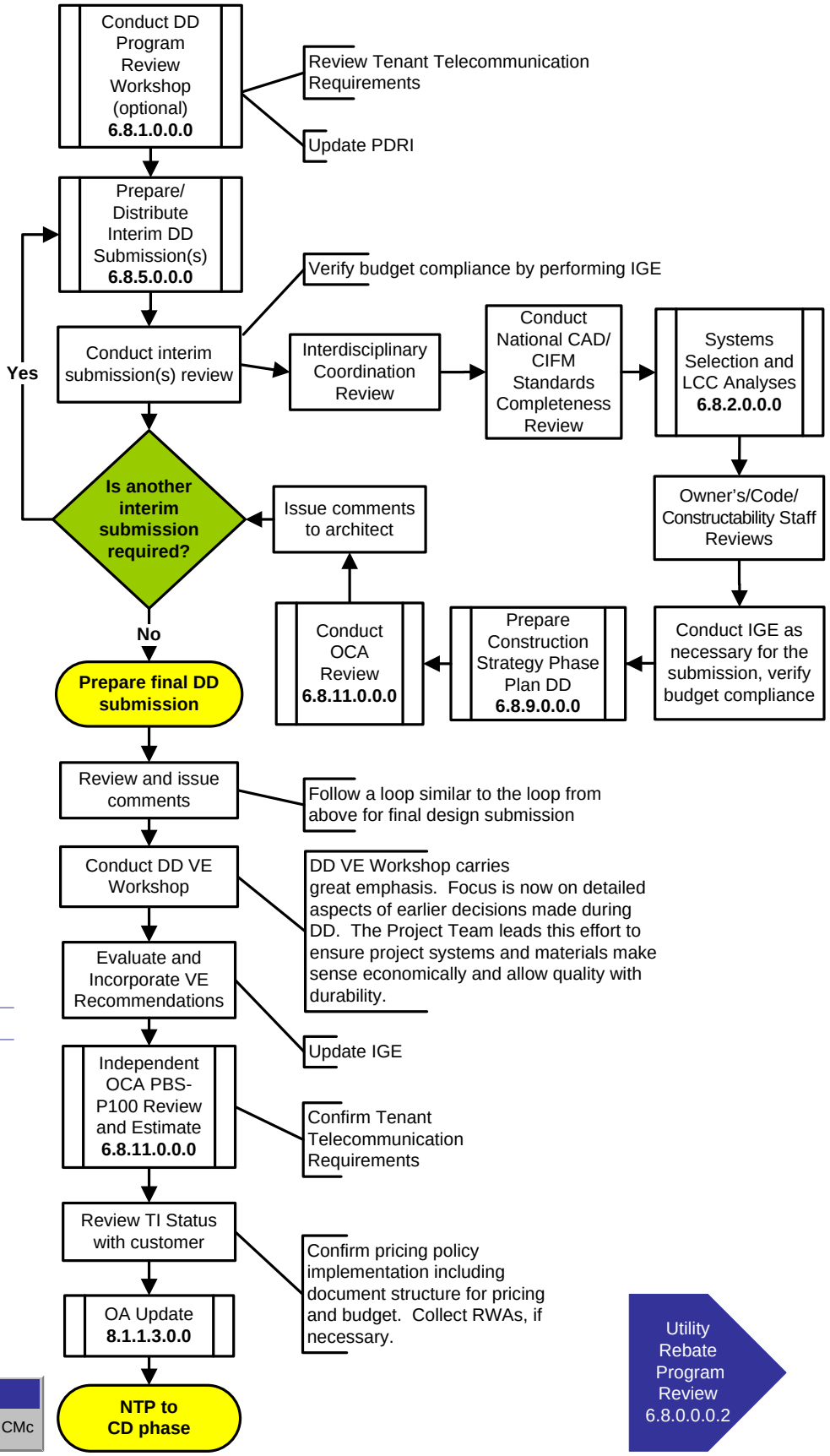
This page applies to:

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

Design Development (Process) 6.8.0.0.0.1

6.0.0.0.0 Design
Traditional
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



LINKS

National CAD/ CIFM Standards — OA Tool

PBS-P100 — PDRI

Concept Design (Overview) 6.7.0.0.0

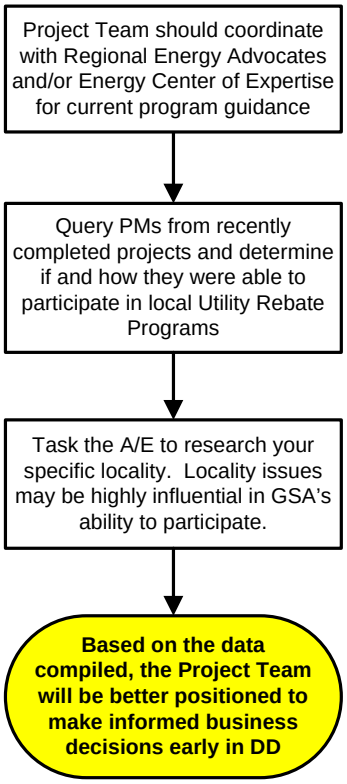
Utility Rebate Program Review 6.8.0.0.0.2

This page applies to:

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

6.8.0.0.0.2 Utility Rebate Program Review

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
6.8.0.0.0.2 Utility Rebate Program Review
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy



LINKS

HVAC Excellence | PBS-P100

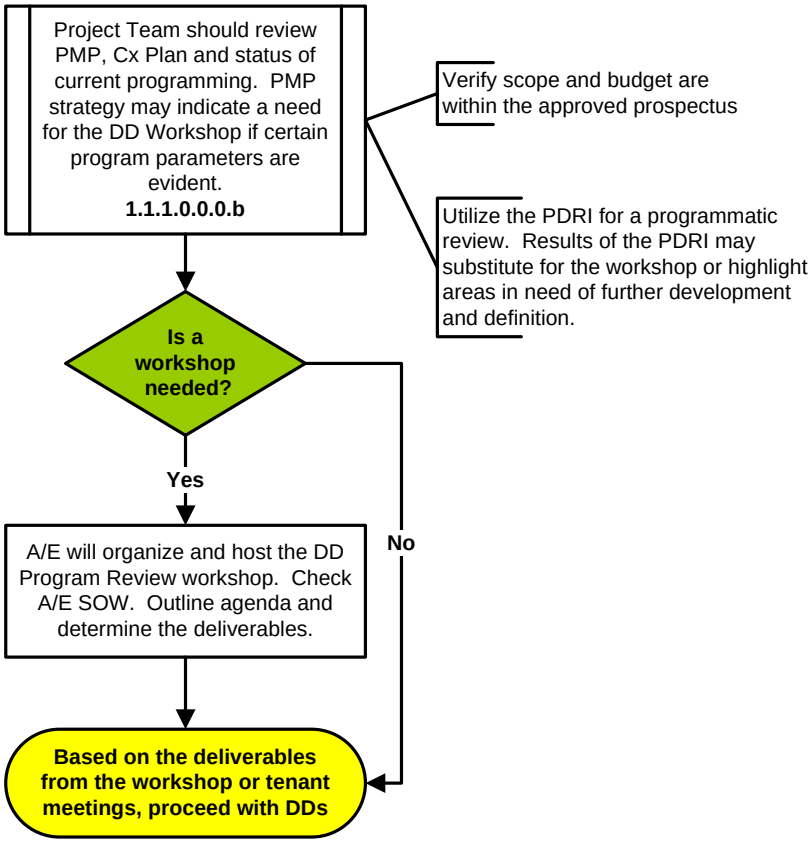
This page applies to:

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

DD Program Review Workshop 6.8.1.0.0.0

6.0.0.0.0.0 Design
Traditional
6.8.1.0.0.0 DD Program Review Workshop

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
6.8.1.0.0.0 DD Program Review Workshop
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy



This page applies to:

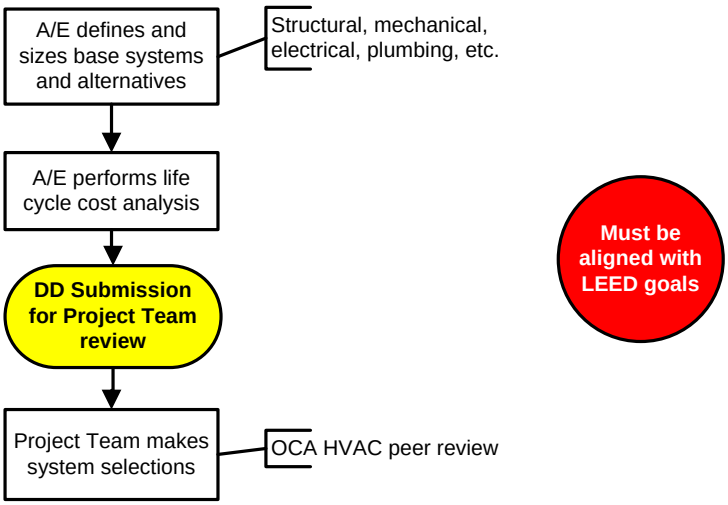
☑ Traditional ☑ D/B ☑ D/B-Bridging ☑ CMc

DD Systems Selection Analyses 6.8.2.0.0.0

DD Program Review Workshop 6.8.1.0.0.0

6.0.0.0.0.0 Design
Traditional
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:

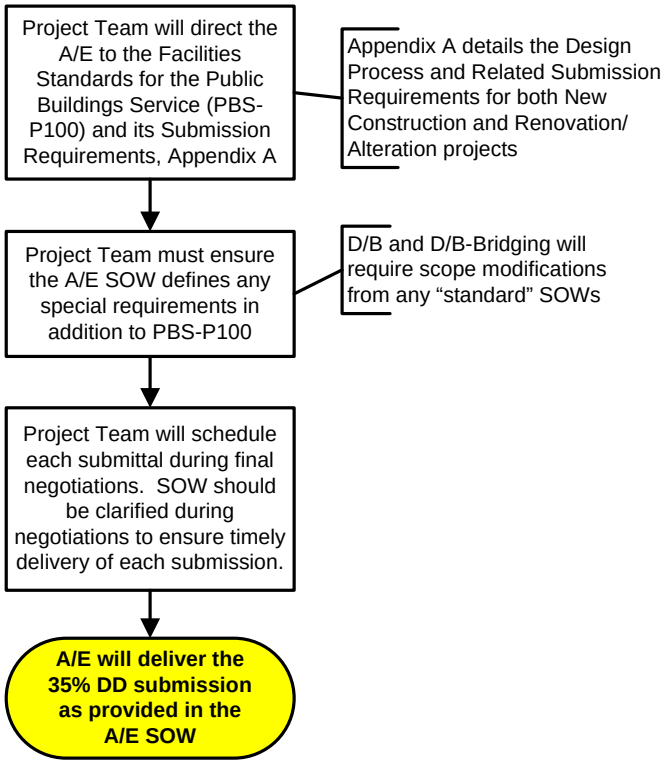
☑ Traditional ☑ D/B ☑ D/B-Bridging ☑ CMc

DD Submission (35%) 6.8.5.0.0.0

DD Systems Selection Analyses 6.8.2.0.0.0

6.0.0.0.0.0 Design
Traditional
6.8.5.0.0.0 DD Submission (35%)

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
6.8.5.0.0.0 DD Submission (35%)
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy



LINKS

PBS-P100

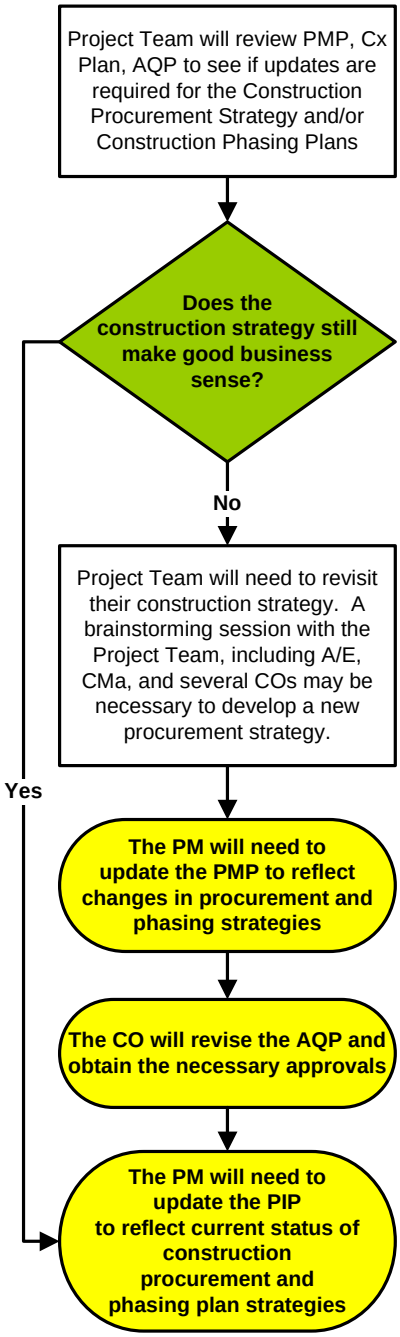
This page applies to:

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

Construction Strategy/ Phasing Plan 6.8.9.0.0.0

6.0.0.0.0.0 Design
Traditional
6.8.9.0.0.0 Construction Strategy/Phasing Plan

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
3.0.0.0.0.0 Authorization/ Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design/Build
6.0.0.0.0.0 Design
6.8.9.0.0.0 Construction Strategy/ Phasing Plan
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy



LINKS

PBS-P100 — PMP 1.1.1.0.0.0.b

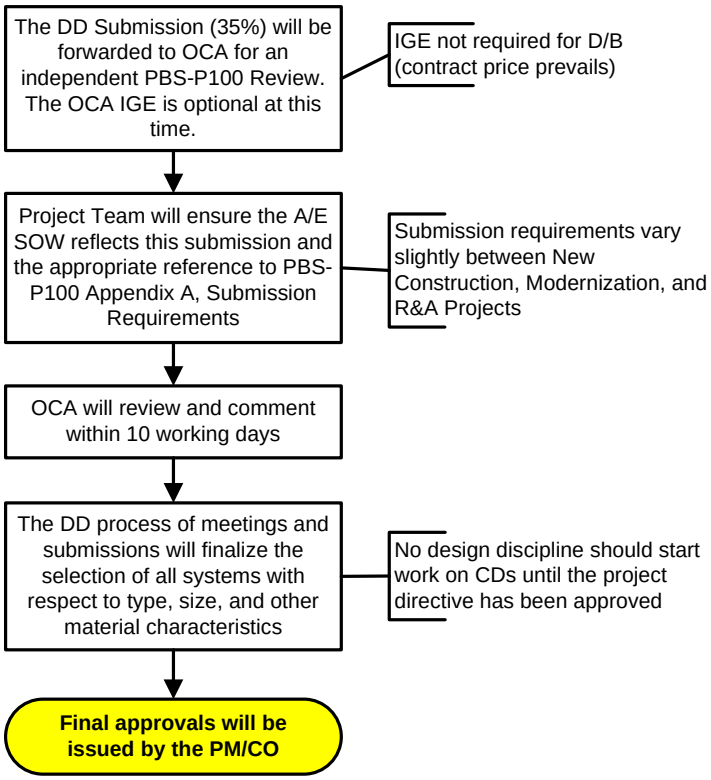
This page applies to:

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

Independent OCA PBS-P100 Review 6.8.11.0.0.0

6.0.0.0.0.0 Design
Traditional
6.8.11.0.0.0 Independent OCA PBS-P100 Review and IGE

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
6.8.11.0.0.0 Independent OCA PBS-P100 Review and IGE Estimate
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy



LINKS

PBS-P100

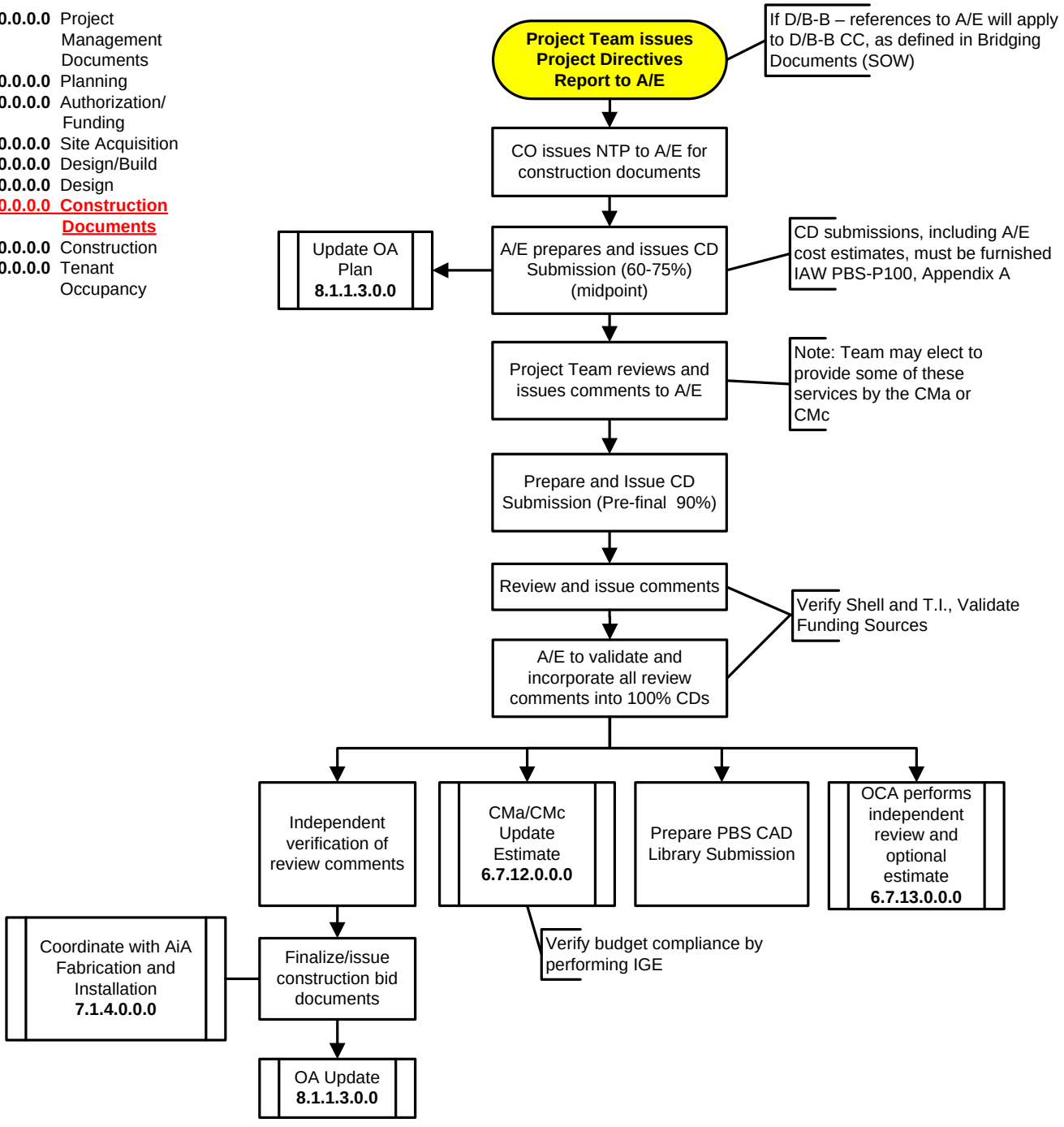
This page applies to:

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

6.0.0.0.0.0 Design
Traditional
6.9.0.0.0.0 Construction Documents

Independent OCA PBS-P100 Review and IGE 6.8.11.0.0.0

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
6.9.0.0.0.0 Construction Documents
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy



LINKS

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

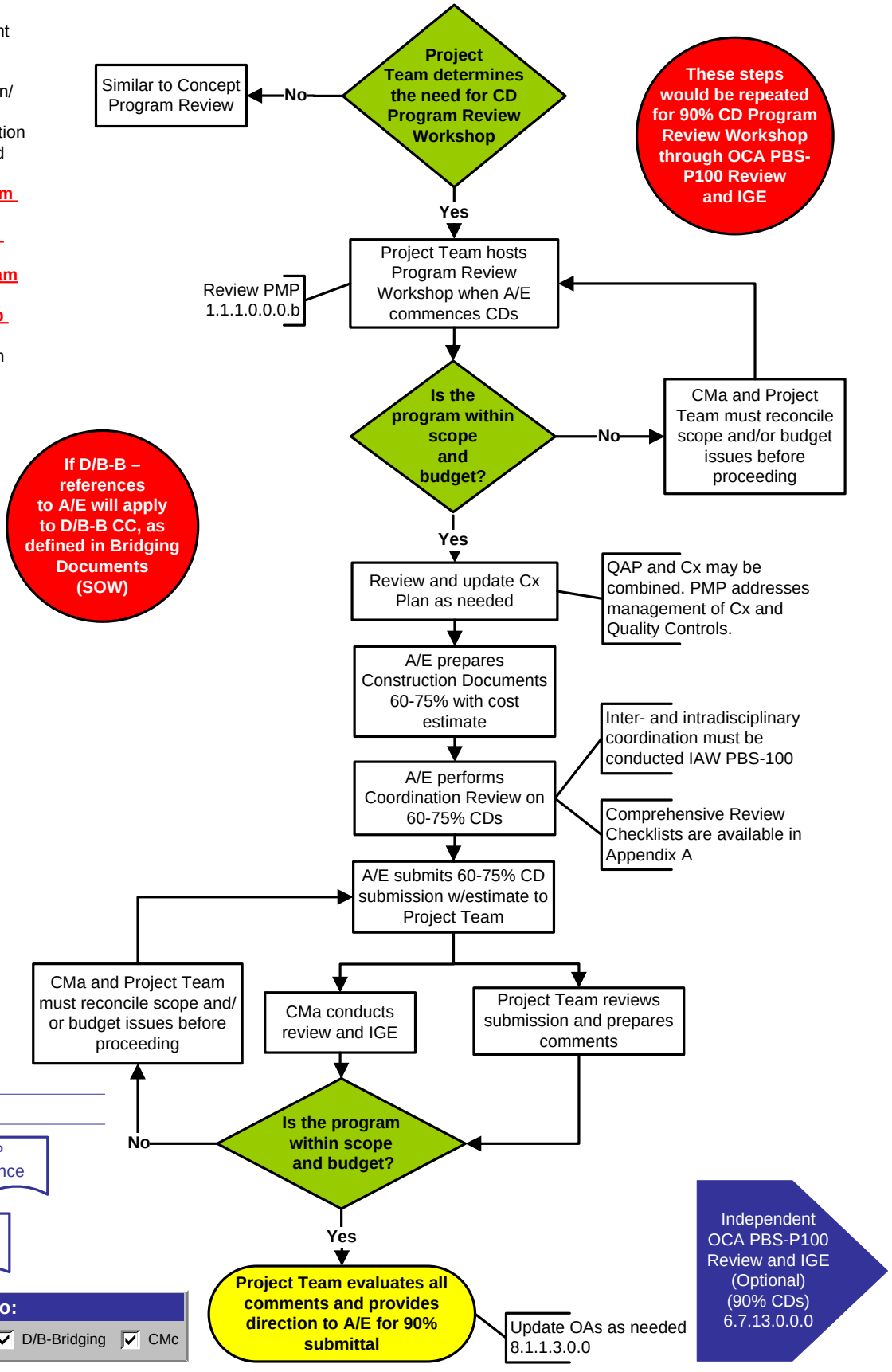
This page applies to:

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

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

6.0.0.0.0.0 Design
Traditional
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
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
6.9.3.0.0.0 CD Program Review Workshop (CD Start)
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



LINKS

PBS-P100 | PMP Reference

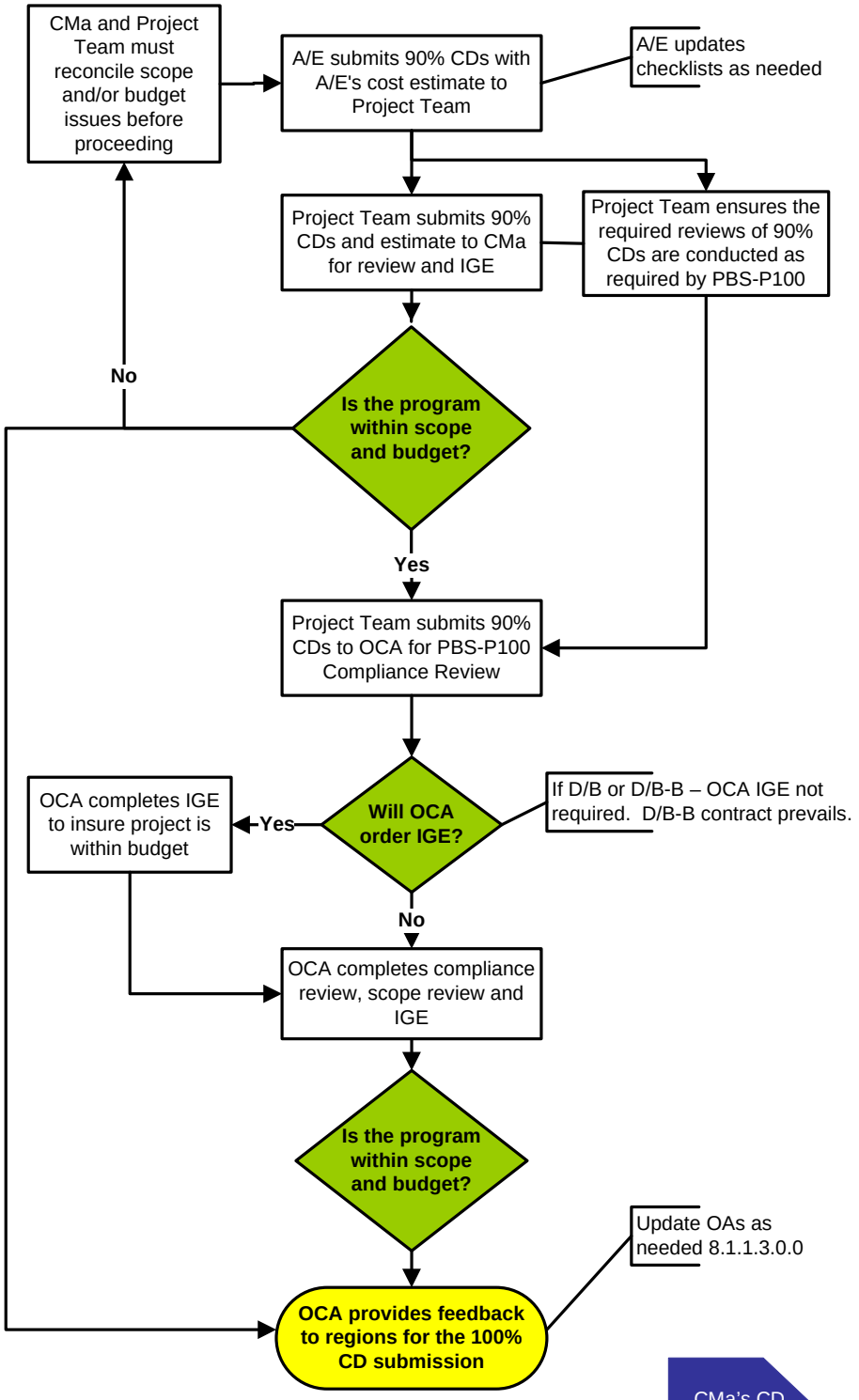
Professional Services Estimating Tool

This page applies to:

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

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

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
3.0.0.0.0.0 Authorization/ Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design/Build
6.0.0.0.0.0 Design
6.7.13.0.0.0 Independent OCA PBS-P100 Review and IGE (Optional) (90% CDs)
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy



LINKS

PBS-P100 | PMP Reference

Professional Services Estimating Tool

This page applies to:

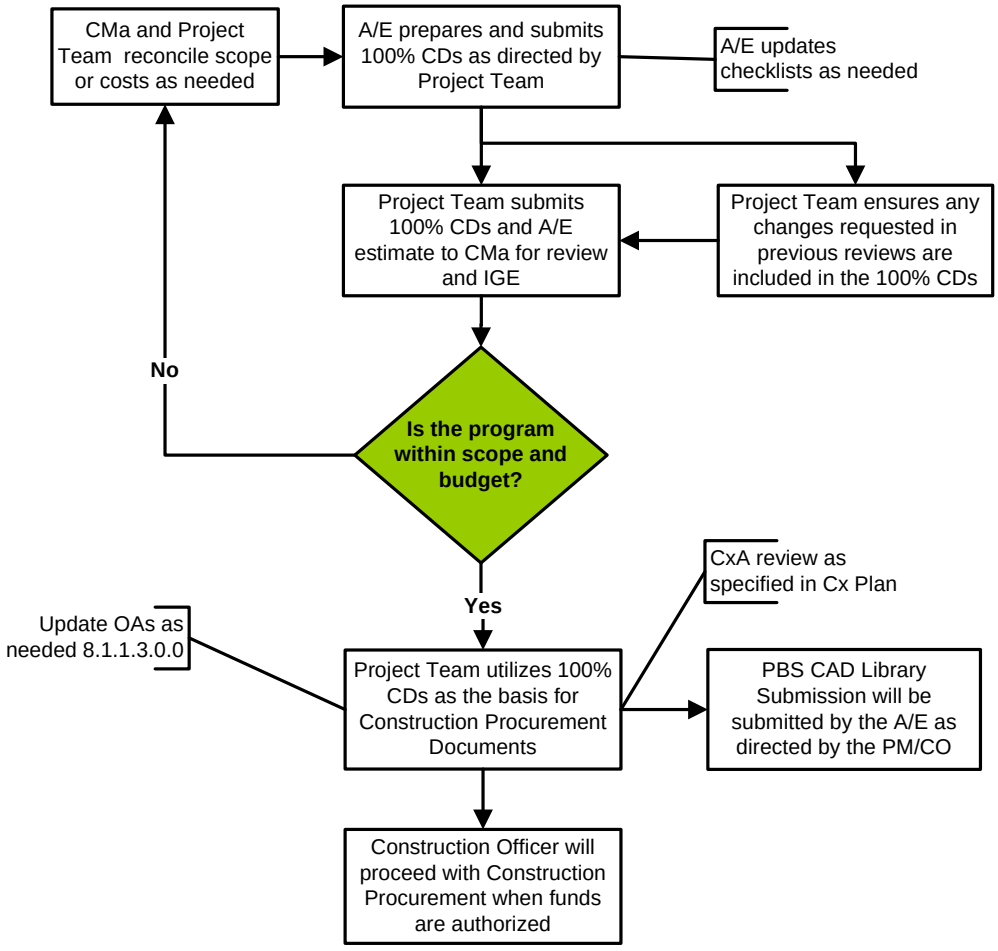
☑ Traditional ☐ D/B ☑ D/B-Bridging ☑ CMc

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

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

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

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



LINKS

PBS-P100 | PMP Reference | Professional Services Estimating Tool

This page applies to:

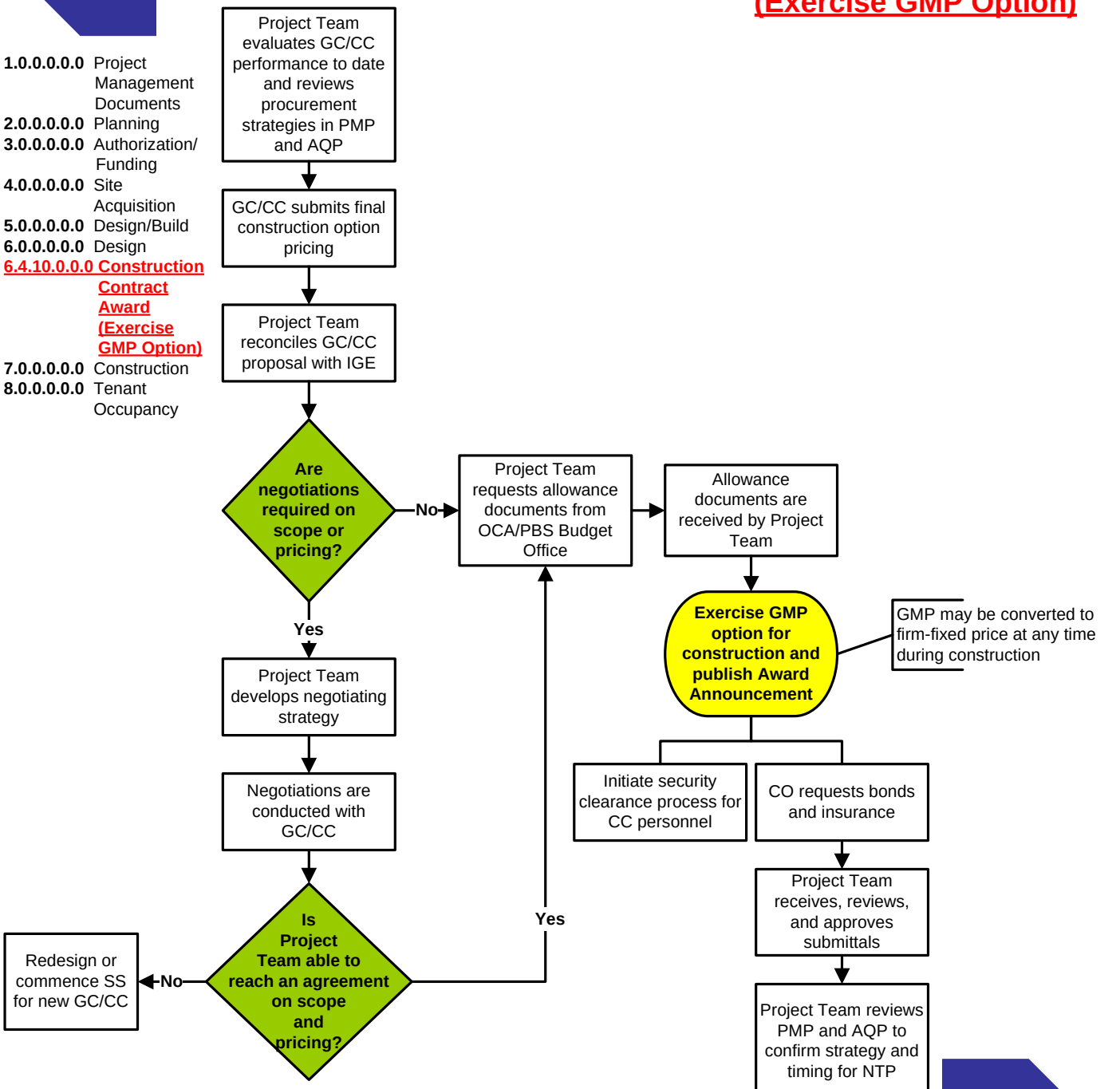
☑ Traditional ☑ D/B ☑ D/B-Bridging ☑ CMc

Construction 7.0.0.0.0.0

6.4.10.0.0.0. Construction Contract Award (Exercise GMP Option)

Construction Procurement 6.10.1.0.0.0

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
6.4.10.0.0.0 Construction Contract Award (Exercise GMP Option)
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy



Construction Contract Award and Pre-NTP Documents 6.10.14.0.0.0

NTP 7.1.1.0.0.0

LINKS

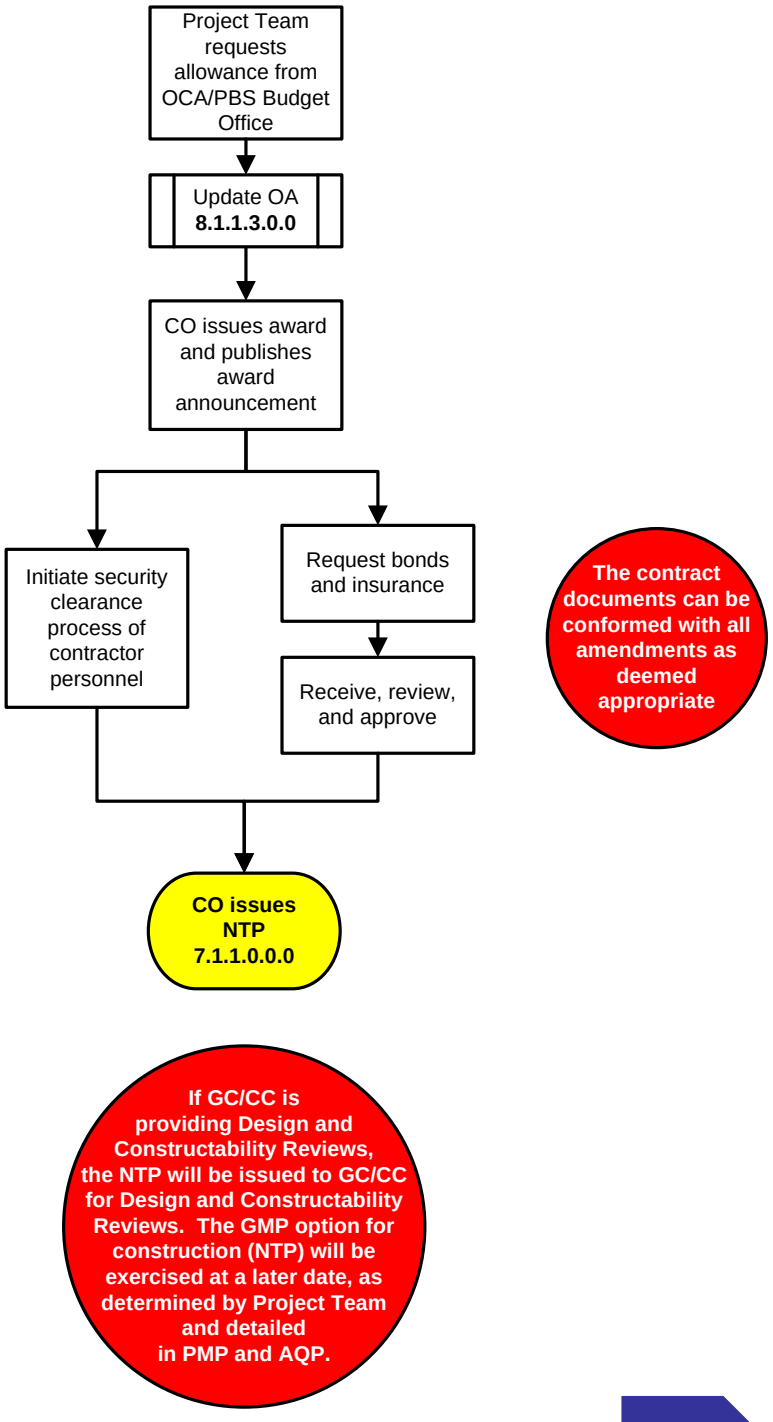
Acquisition Plan | PMP Reference

This page applies to:

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

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

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
3.0.0.0.0.0 Authorization/ Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design/Build
6.0.0.0.0.0 Design
7.0.0.0.0.0 Construction
6.10.14.0.0.0 Construction Contract Award
6.10.15.0.0.0 Pre-NTP Documents (Bonds, Insurance, Security, Etc.)
8.0.0.0.0.0 Tenant Occupancy



This page applies to:

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

Professional Services Task Orders 6.10.16.0.0.0

7.0.0.0.0.0 Construction
Traditional
7.0.0.0.0.0 Construction

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

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

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.

GC/CC Source Selection Plan 6.10.0.0.0.0

This page applies to:

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

Construction
7.0.0.0.0.0

7.0.0.0.0.0 Construction
Traditional
6.10.0.0.0.0 Construction Procurement

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

GC/CC Source Selection Plan
6.10.1.0.0.0

Construction Contract
(Exercise of GMP Option)

Advertisement for Construction Services
6.10.2.0.0.0

Pre-Proposal Conference
6.10.4.0.0.0

Proposal Document Addenda
6.10.11.0.0.0

GC/CC Selection Evaluation Factors (Phase I)
6.10.1.1.0.0

GC/CC Evaluations/Selection (Phase I)

GC/CC Submissions (Phase II)

GC/CC Evaluations/ Selection (Phase II)
6.10.13.0.0.0

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

Construction Document (if D/B-B)
6.9.0.0.0.0

Professional Services Task Orders (Construction)
6.10.16.0.0.0

AiA Fabrication Task Order
7.1.4.0.0.0

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

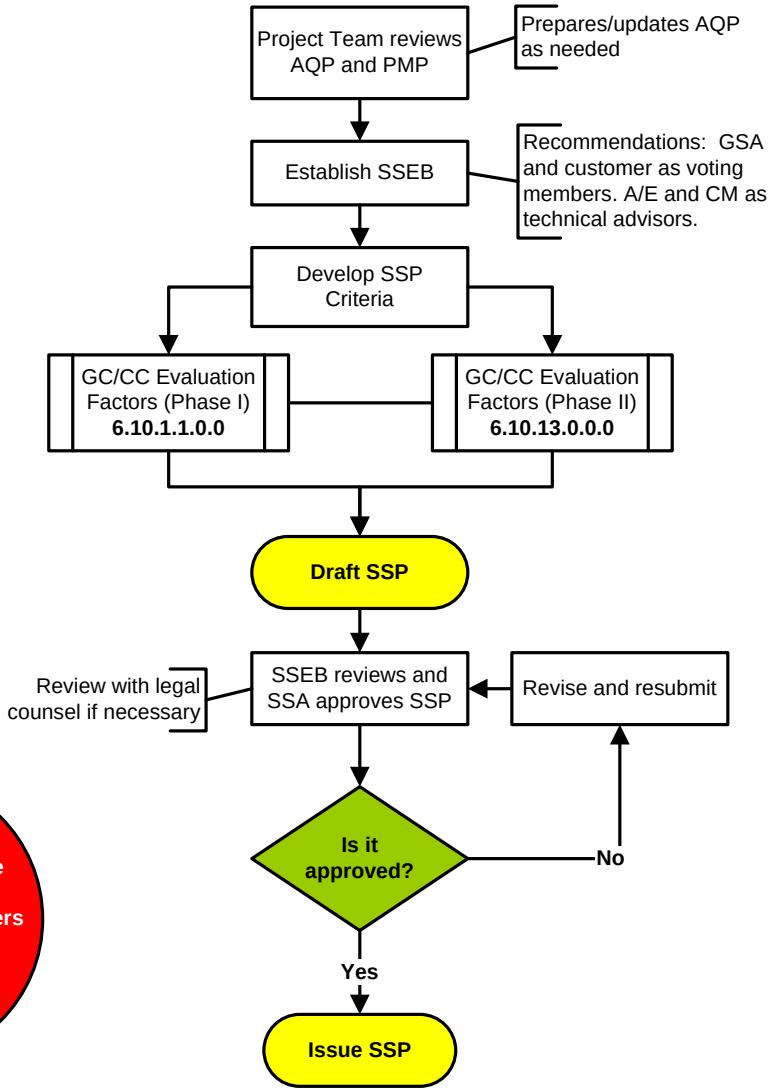
This page applies to:

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

GC/CC Source Selection Plan 6.10.1.0.0.0

7.0.0.0.0.0 Construction
Traditional
6.10.1.0.0.0 GC/CC Source Selection Plan

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
3.0.0.0.0.0 Authorization/ Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design/Build
6.0.0.0.0.0 Design
7.0.0.0.0.0 Construction
6.10.1.0.0.0 GC/CC Source Selection Plan
8.0.0.0.0.0 Tenant Occupancy



GC/CC – GC – refers to 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:

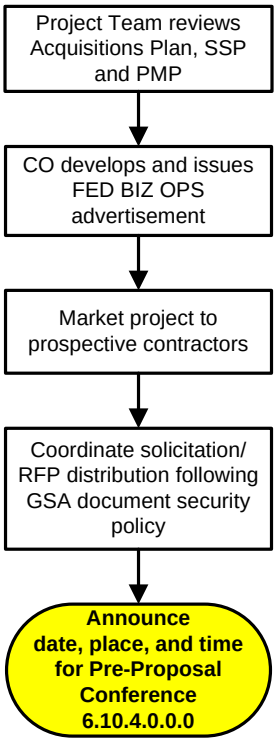
☑ Traditional ☐ D/B ☑ D/B-Bridging ☑ CMc

Advertisement for Construction Services 6.10.2.0.0.0

6.10.2.0.0.0 Advertisement for Construction Services

GC/CC Source Selection Plan 6.10.1.0.0.0

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
6.10.2.0.0.0 Advertisement for Construction Services
8.0.0.0.0.0 Tenant Occupancy



This page applies to:

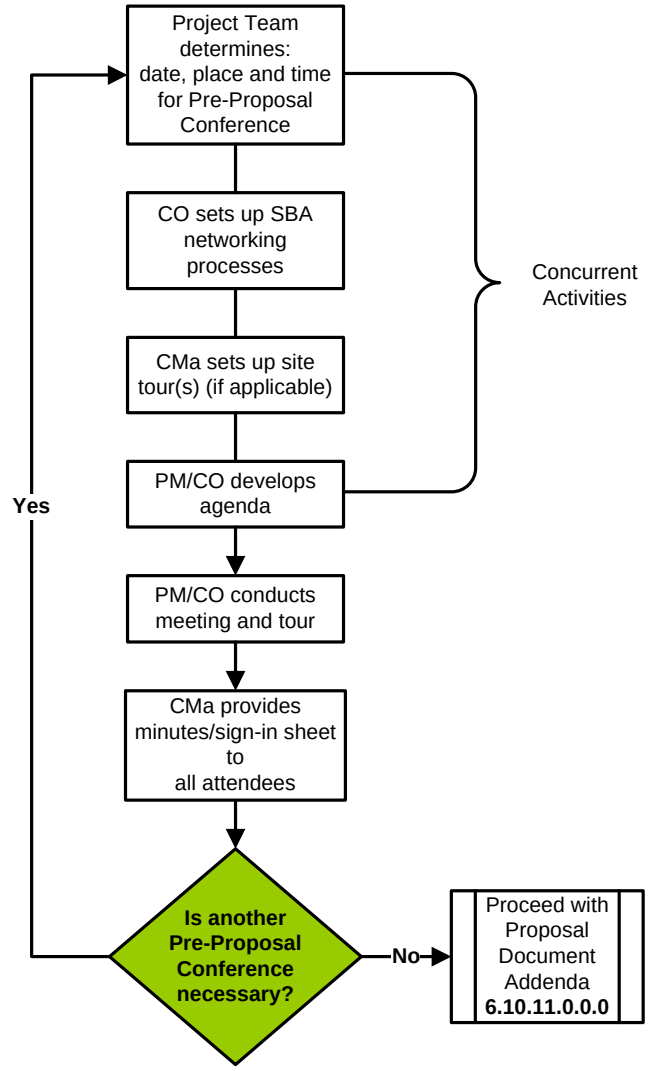
☑ Traditional ☐ D/B ☑ D/B-Bridging ☑ CMc

Pre-Proposal Conference 6.10.4.0.0.0

6.10.4.0.0.0 Pre-Proposal Conference

Advertisement for Construction Services 6.10.2.0.0.0

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



LINKS

FAR | GSAM

Sample Agenda | GC/CC Source Selection Plan 6.10.1.0.0.0

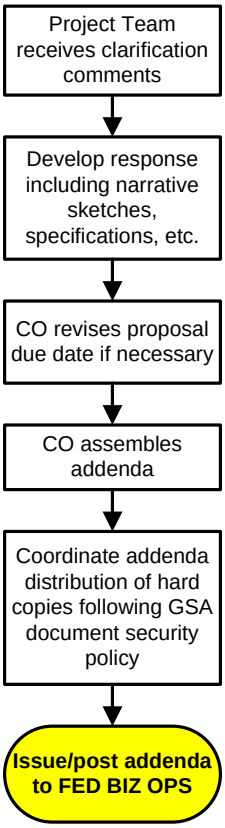
This page applies to:

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

Proposal Document Addenda 6.10.11.0.0.0

7.0.0.0.0.0 Construction
Traditional
6.10.11.0.0.0 Proposal Document Addenda

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
6.10.11.0.0.0 Proposal Document Addenda
8.0.0.0.0.0 Tenant Occupancy



LINKS

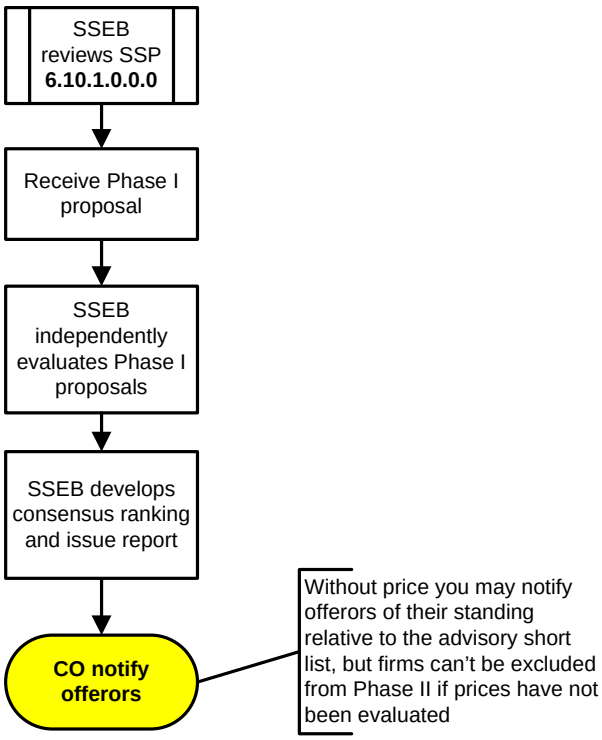
FAR | GSAM

This page applies to:

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

GC/CC Selection Evaluation Factors (Phase I) 6.10.1.1.0.0

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
3.0.0.0.0.0 Authorization/Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design/Build
6.0.0.0.0.0 Design
7.0.0.0.0.0 Construction
6.10.1.1.0.0 GC/CC Selection Evaluation Factors (Phase I)
6.10.8.0.0.0 GC/CC Evaluations/Selection (Phase I)
8.0.0.0.0.0 Tenant Occupancy



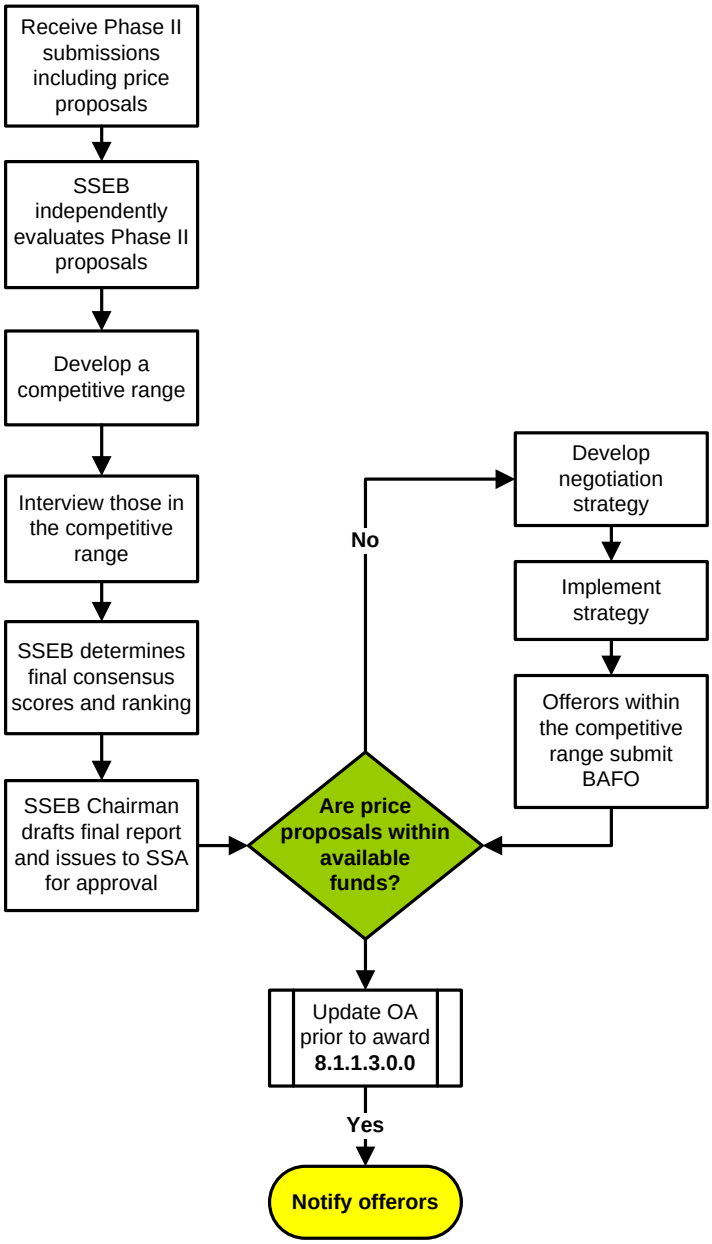
This page applies to:
☑ Traditional ☐ D/B ☑ D/B-Bridging ☑ CMc

GC/CC Evaluations Selection (Phase II) 6.10.13.0.0.0

6.10.13.0.0.0 GC/CC Evaluations/Selection (Phase II)

GC/CC Selection Evaluation Factors (Phase I) 6.10.1.1.0.0

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
6.10.13.0.0.0 GC/CC Selection Evaluation Selection (Phase II)
8.0.0.0.0.0 Tenant Occupancy



Construction Contract Award and Pre-NTP Documents 6.10.14.0.0.0

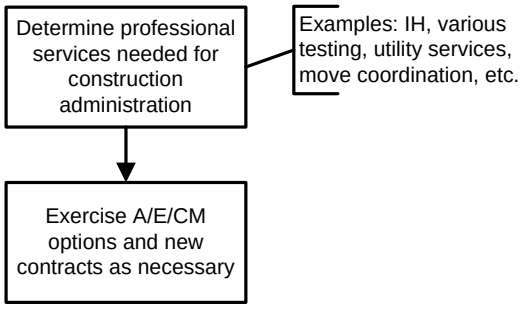
This page applies to:

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

Construction Procurement 6.10.0.0.0.0

7.0.0.0.0.0 Construction
Traditional
6.10.16.0.0.0 Professional Services Task Orders (Construction)

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
3.0.0.0.0.0 Authorization/ Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design/Build
6.0.0.0.0.0 Design
7.0.0.0.0.0 Construction
6.10.16.0.0.0 Professional Services Task Orders (Construction)
8.0.0.0.0.0 Tenant Occupancy



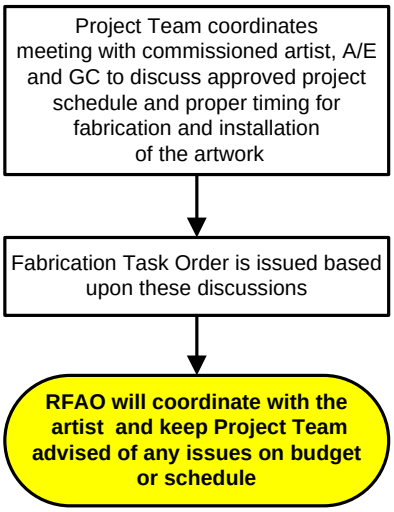
This page applies to:

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

Construction Procurement 6.10.0.0.0.0

7.0.0.0.0.0 Construction
Traditional
7.1.4.0.0.0 Art-in-Architecture Fabrication Task Order

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
7.1.4.0.0.0 Art-in Architecture Fabrication Task Order
8.0.0.0.0.0 Tenant Occupancy



LINKS

AiA Contract 6.1.0.0.0.0.b

This page applies to:

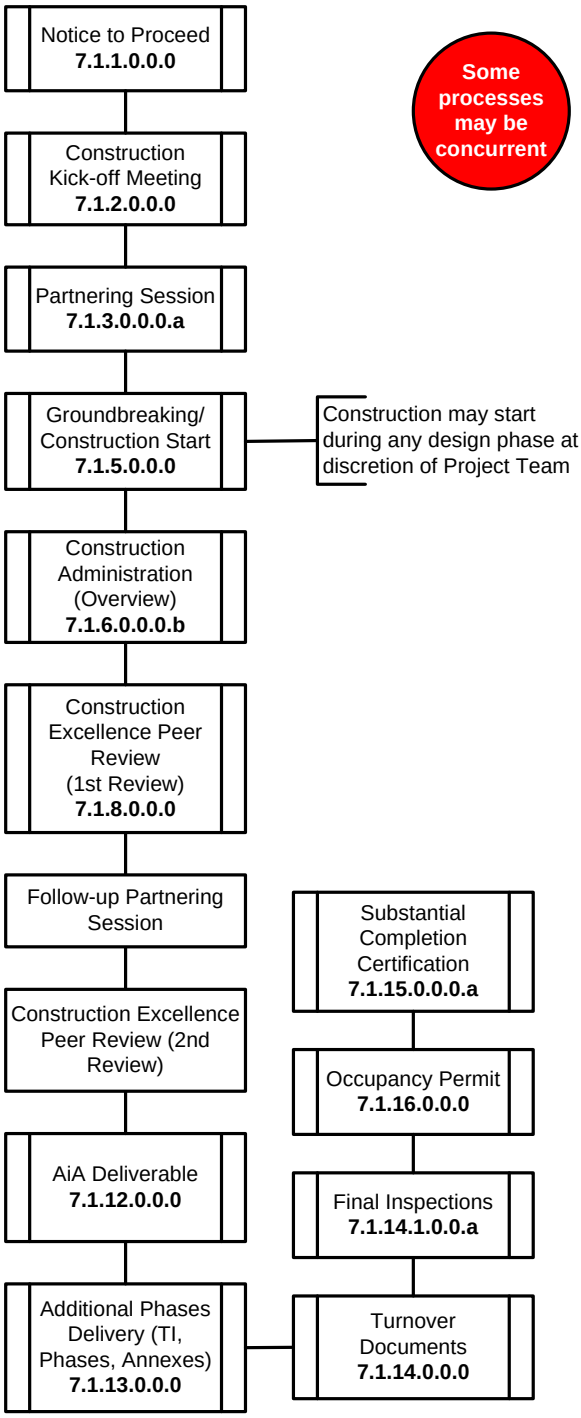
☑ Traditional ☐ D/B ☑ D/B-Bridging ☑ CMc

AiA Deliverable 7.1.12.0.0.0

AiA Fabrication Task Order 7.1.4.0.0.0

7.0.0.0.0.0 Construction
Traditional
7.1.0.0.0.0 (0% to 100% Construction)

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
3.0.0.0.0.0 Authorization/ Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design/Build
6.0.0.0.0.0 Design
7.0.0.0.0.0 Construction
7.1.0.0.0.0 (0% to 100% Construction)
8.0.0.0.0.0 Tenant Occupancy



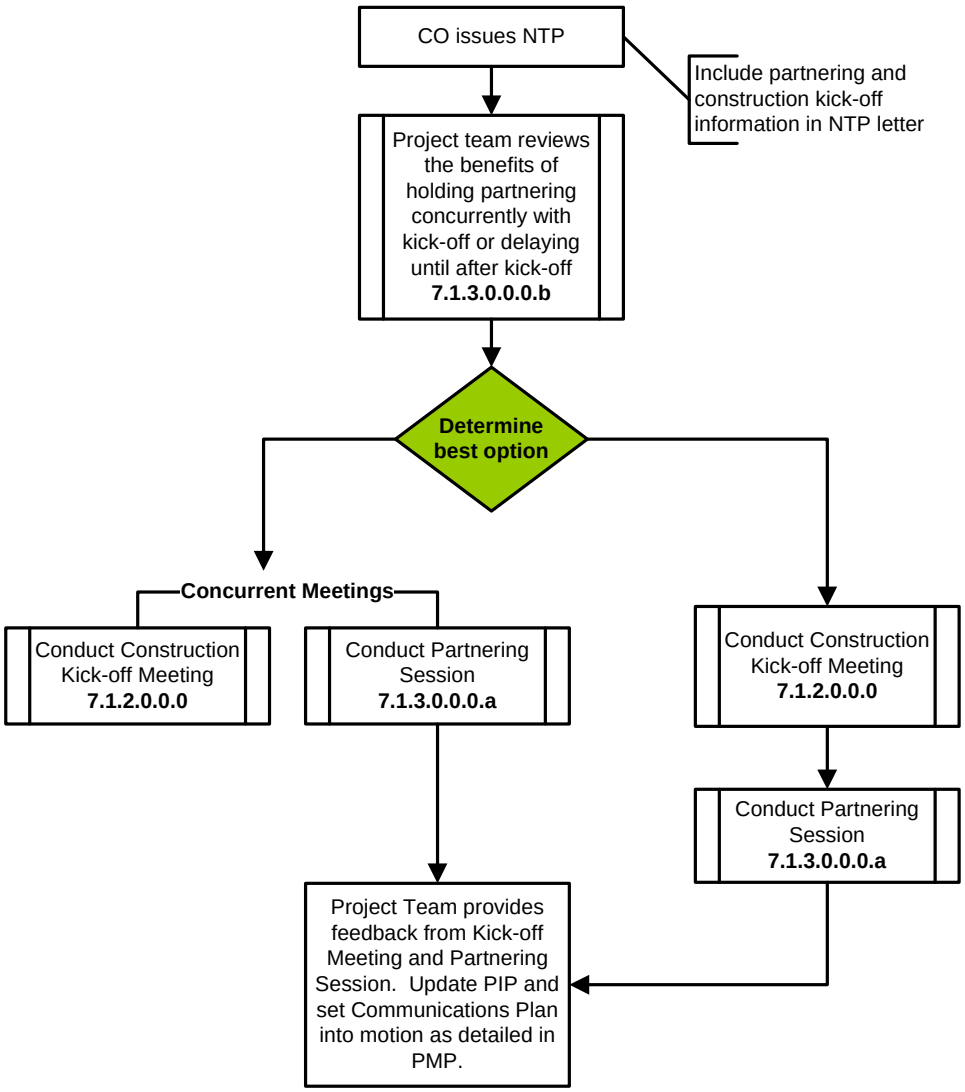
This page applies to:

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

Notice to Proceed 7.1.1.0.0.0

7.0.0.0.0.0 Construction
Traditional
7.1.1.0.0.0 Notice To Proceed

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
7.1.1.0.0.0 Notice to Proceed
8.0.0.0.0.0 Tenant Occupancy



LINKS

Sample NTP Letter

This page applies to:

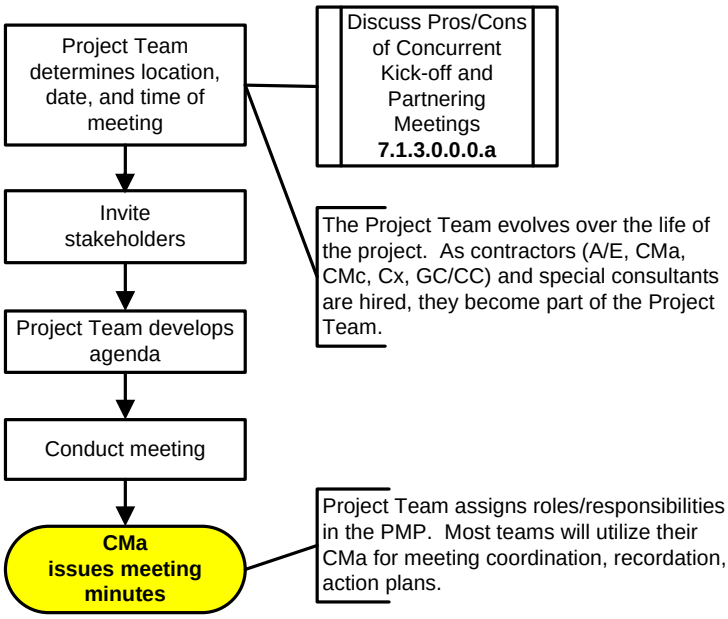
☑ Traditional ☐ D/B ☑ D/B-Bridging ☑ CMc

Construction Kick-off Meeting 7.1.2.0.0.0

7.1.2.0.0.0 Construction Kick-off Meeting

Notice to Proceed 7.1.1.0.0.0

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
3.0.0.0.0.0 Authorization/ Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design/Build
6.0.0.0.0.0 Design
7.0.0.0.0.0 Construction
7.1.2.0.0.0 Construction Kick-off Meeting
8.0.0.0.0.0 Tenant Occupancy



LINKS

Sample Kick-off Meeting Agenda

Suggested Stakeholders Invitation List

PMP 1.1.1.0.0.0.b

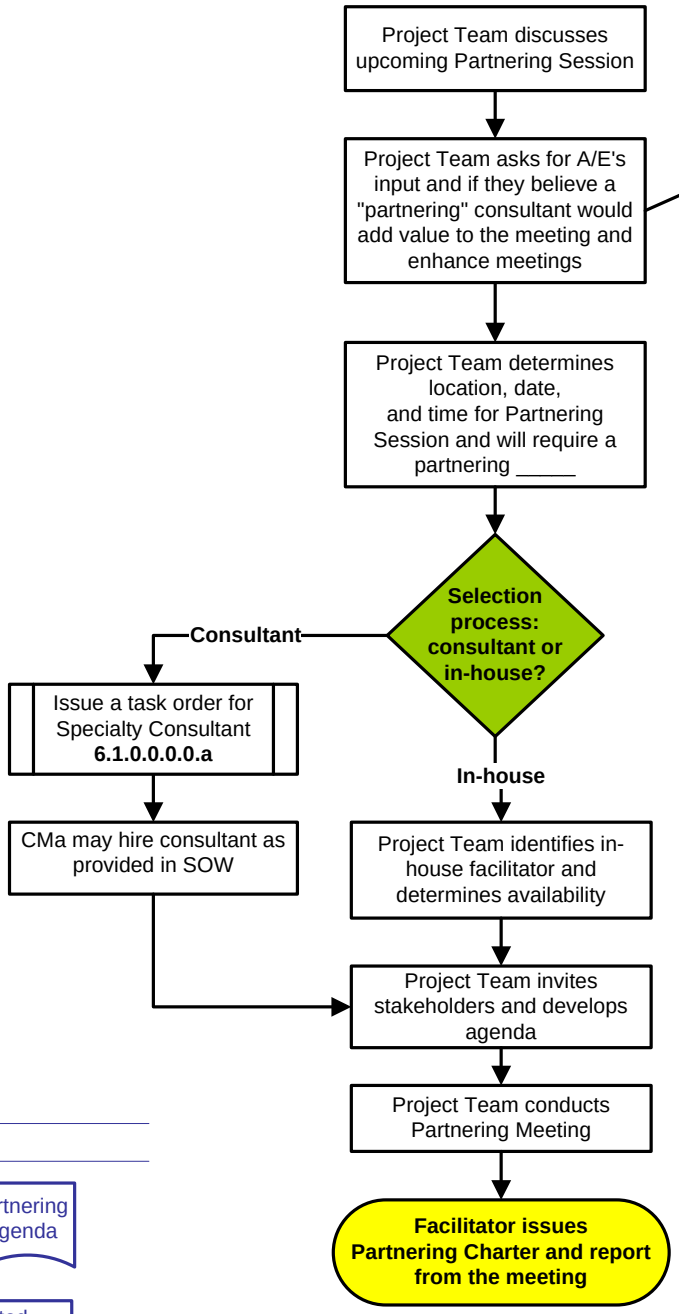
This page applies to:

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

Partnering Session 7.1.3.0.0.0.a

Construction Kick-off Meeting 7.1.2.0.0.0

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
7.1.3.0.0.0.a Partnering Session
8.0.0.0.0.0 Tenant Occupancy



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

Partnering Session: Timing Benefits and Drawbacks 7.1.3.0.0.0.b

Partnering Session 7.1.3.0.0.0.a

7.1.3.0.0.0.b Partnering Session: Timing Benefits and Drawbacks

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
7.1.3.0.0.0.b Partnering Session: Timing Benefits and Drawbacks
8.0.0.0.0.0 Tenant Occupancy

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.

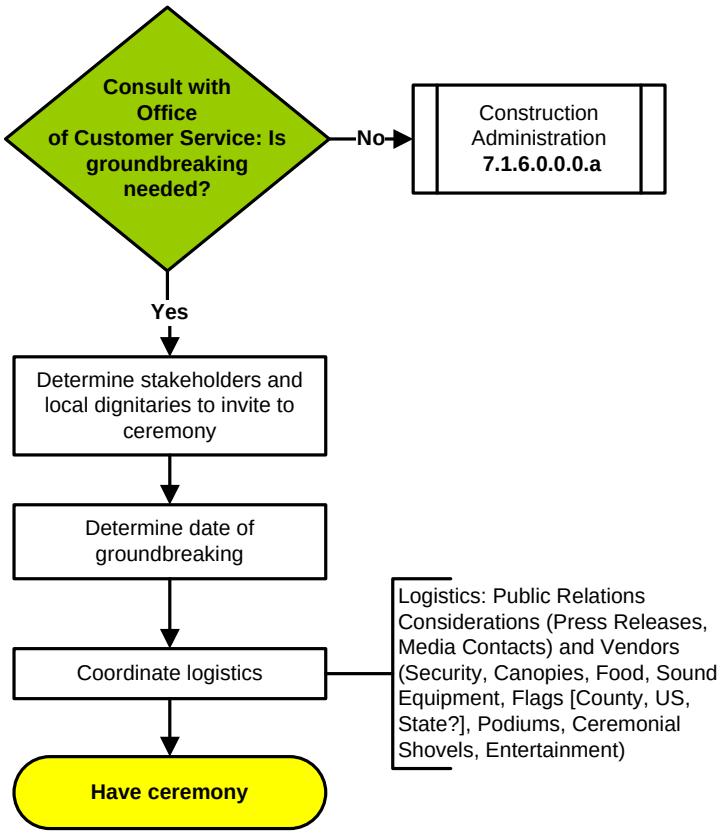
This page applies to:

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

Groundbreaking/ Construction Start 7.1.5.0.0.0

7.0.0.0.0.0 Construction
Traditional
7.1.5.0.0.0 Groundbreaking/Construction Start

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
7.1.5.0.0.0 Groundbreaking/ Construction Start
8.0.0.0.0.0 Tenant Occupancy



This page applies to:

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

(0% to 100% Construction)
7.1.0.0.0.0

7.0.0.0.0.0 Construction
Traditional
7.1.6.0.0.0.a Construction Administration

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

Some processes may be concurrent

- Construction Administration (Overview) **7.1.6.0.0.0.b**
- Construction Administration: Safety **7.1.6.0.0.1.a**
- Construction Administration: Project Cost Management **7.1.6.0.0.1.b**
- Request for Information (RFI) **7.1.6.0.0.1.c**
- Construction Schedules **7.1.6.2.0.0**
- Submittal Schedule/ Log/Submissions **7.1.6.4.0.0**
- Quality Control Plan **7.1.2.0.1.2**
- Inspections and Testing Schedule **7.1.6.5.0.0**
- Special Testing/Mock-up Plans/Reports **7.1.6.6.0.0**
- Additional Phases Delivery (TI, Phases, Annexes) **7.1.13.0.0.0**
- AiA Deliverable **7.1.12.0.0.0**
- Construction Excellence Peer Review (2nd Review) **7.1.8.0.0.0**
- Construction Excellence Peer Review (1st Review) **7.1.8.0.0.0**
- Follow-up Partnering Session **7.1.10.0.0.0**
- CII Benchmarking **7.1.7.0.0.0**
- GC/CC Evaluations (NIH) **7.1.9.0.0.0**
- GC/CC Contract Modifications **7.1.6.8.0.0**
- Project Web-cam **7.1.6.1.1.1**

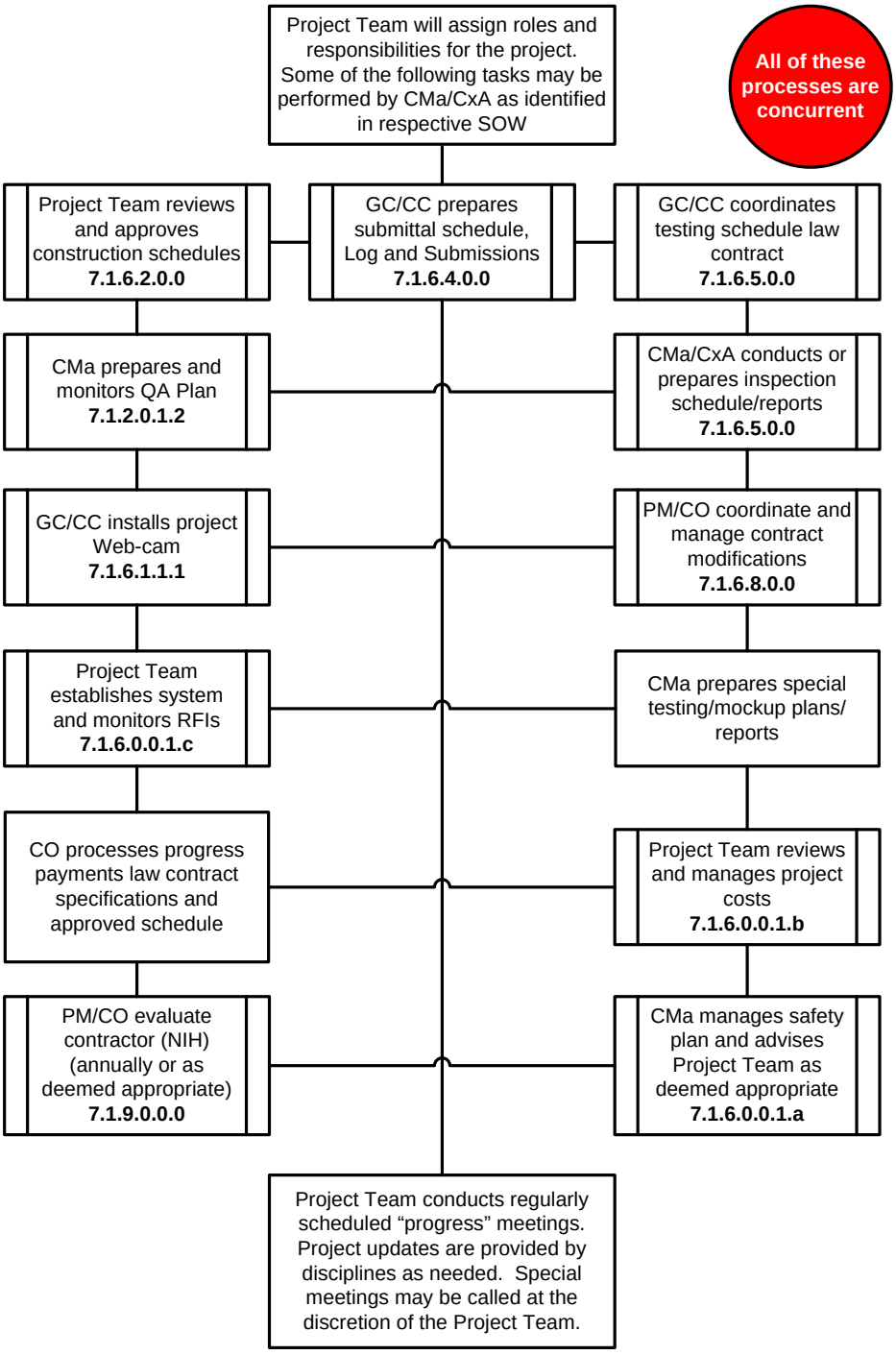
Construction Administration (Overview)
7.1.6.0.0.0.b

This page applies to:

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

7.0.0.0.0.0 Construction
Traditional
7.1.6.0.0.0.b Construction Administration (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
7.0.0.0.0.0 Construction
7.1.6.0.0.0.b Construction Administration (Overview)
8.0.0.0.0.0 Tenant Occupancy



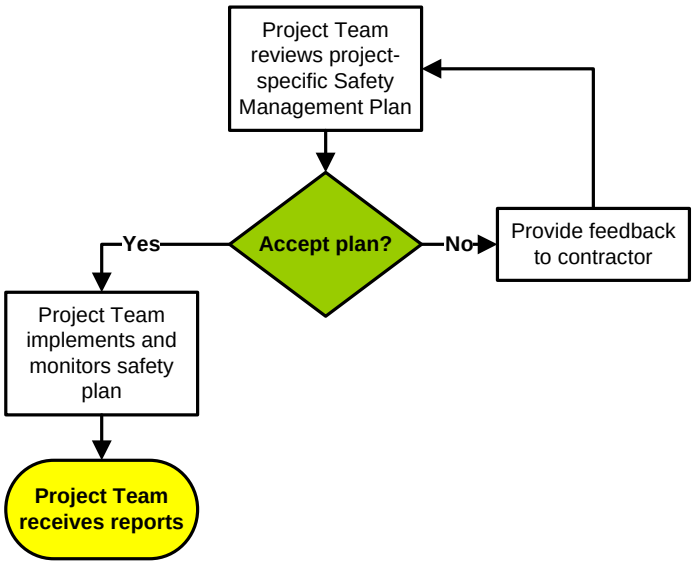
This page applies to:

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

Construction Administration: Safety 7.1.6.0.0.1.a

7.0.0.0.0.0 Construction
Traditional
7.1.6.0.0.1.a Construction Administration: Safety

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

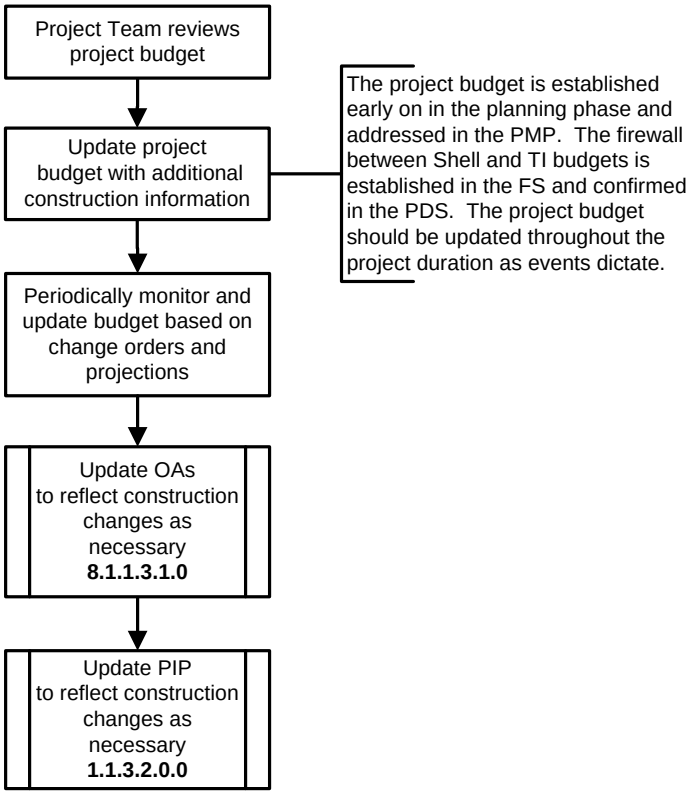


This page applies to:

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

7.0.0.0.0.0.0 Construction
Traditional
7.1.6.0.0.1.b Construction Administration: Project Cost Management

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
3.0.0.0.0.0 Authorization/ Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design/Build
6.0.0.0.0.0 Design
7.0.0.0.0.0 Construction
7.1.6.0.0.1.b Construction Administration: Project Cost Management
8.0.0.0.0.0 Tenant Occupancy

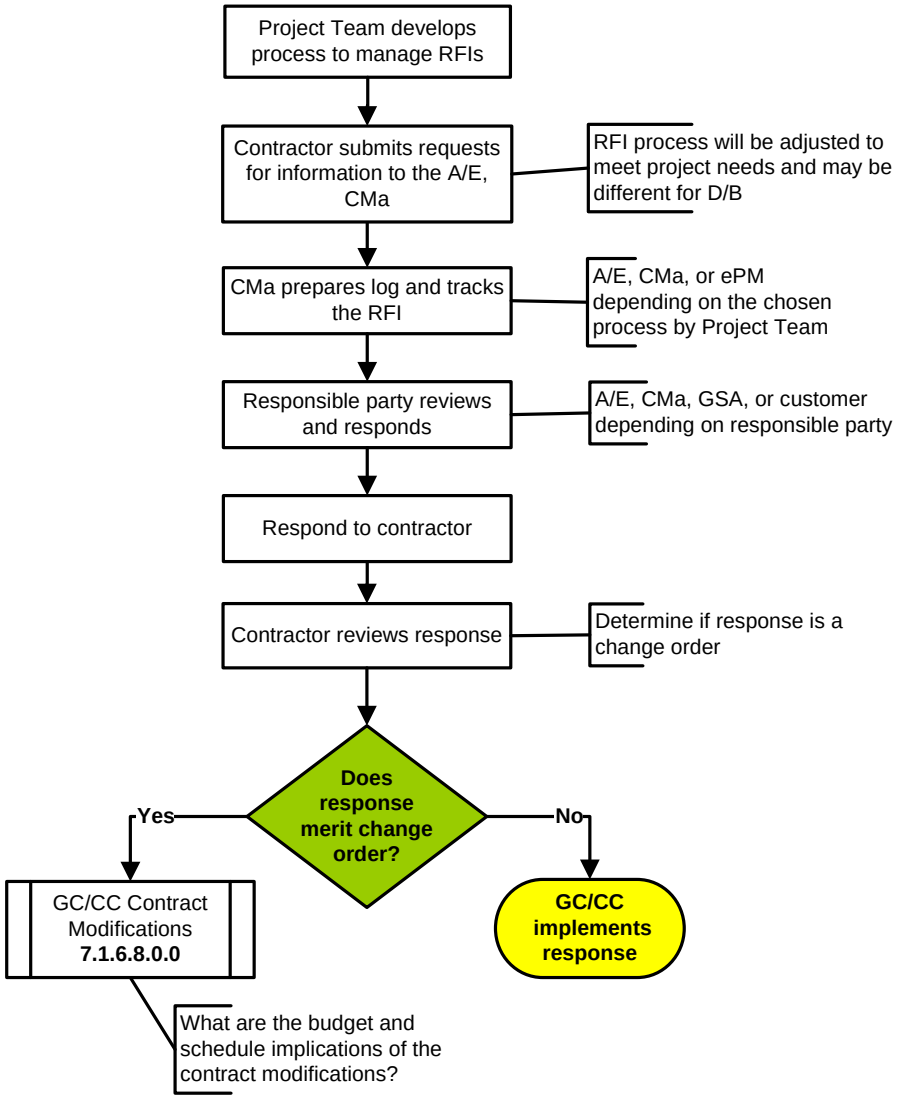


This page applies to:

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

7.0.0.0.0.0 Construction
Traditional
7.1.6.0.0.1.c Requests for Information (RFI)

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
3.0.0.0.0.0 Authorization/ Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design/Build
6.0.0.0.0.0 Design
7.0.0.0.0.0 Construction
7.1.6.0.0.1.c Requests for Information (RFI)
8.0.0.0.0.0 Tenant Occupancy

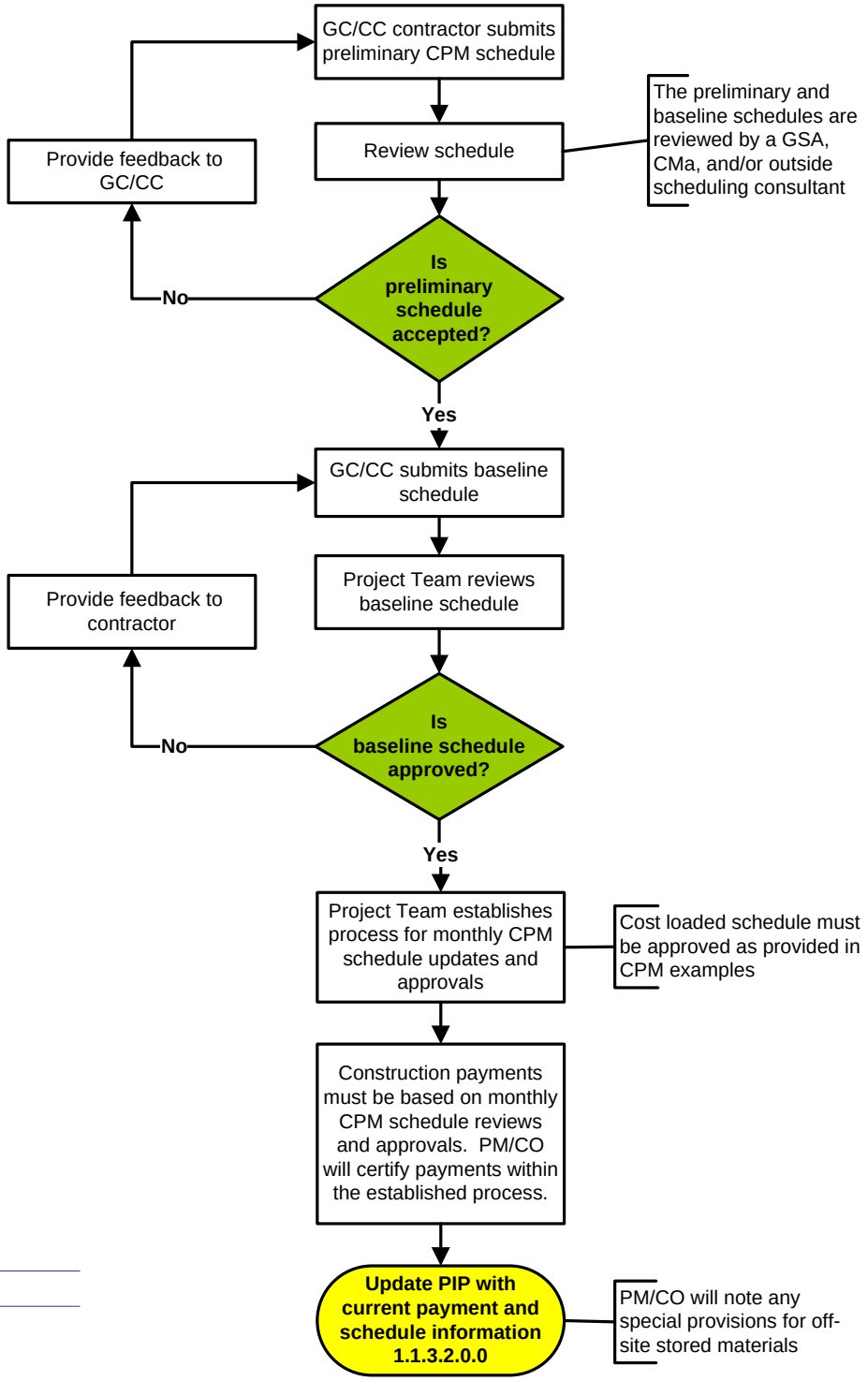


This page applies to:
☑ Traditional ☑ D/B ☑ D/B-Bridging ☑ CMc

Construction Administration 7.1.6.0.0.0.a

7.0.0.0.0.0 Construction
Traditional
7.1.6.2.0.0 Construction Schedules

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



LINKS

CPM Examples

Project Updates in PIP 1.1.3.2.0.0

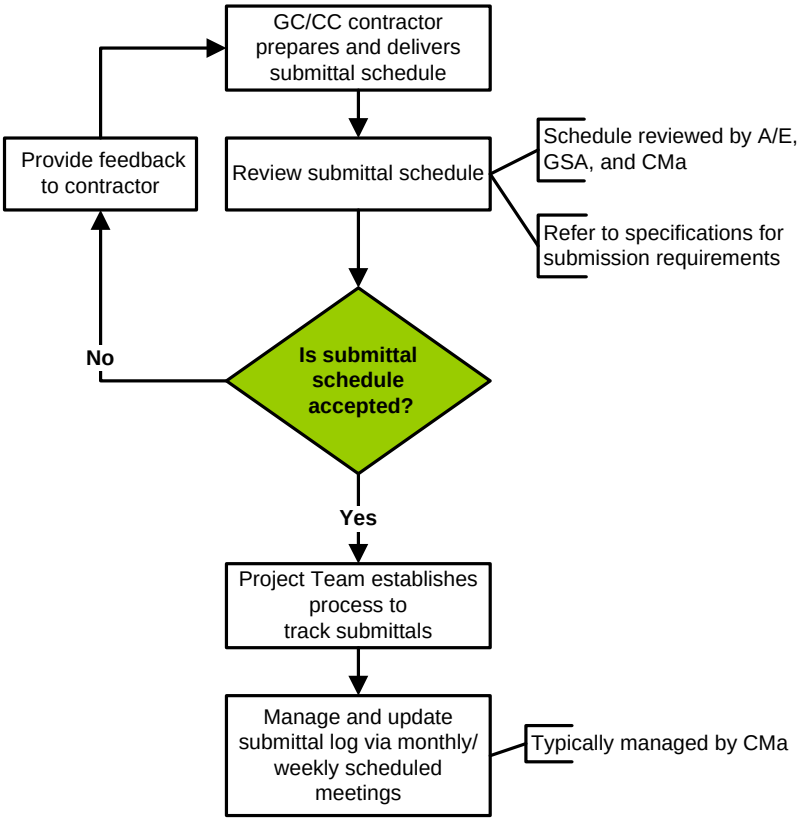
This page applies to:

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

Construction Administration 7.1.6.0.0.0.a

7.0.0.0.0.0 Construction
Traditional
7.1.6.4.0.0 Submittal Schedule/Log/Submissions

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
3.0.0.0.0.0 Authorization/ Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design/Build
6.0.0.0.0.0 Design
7.0.0.0.0.0 Construction
7.1.6.4.0.0 Submittal Schedule/Log/ Submissions
8.0.0.0.0.0 Tenant Occupancy



LINKS

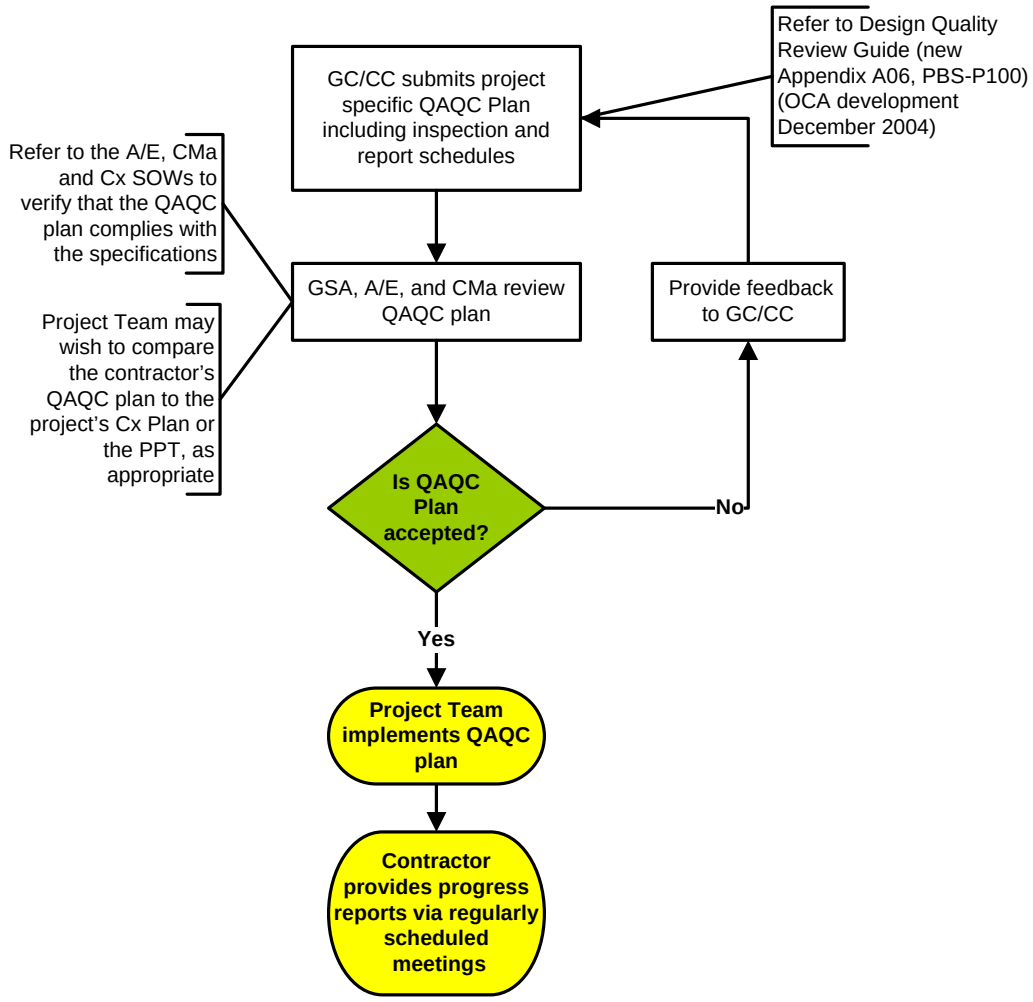
Sample Submittal Schedule

This page applies to:

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

7.0.0.0.0.0 Construction
Traditional
7.1.2.0.1.2 Quality Assurance Quality Control Plans/Reports (QAQC Review 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
7.0.0.0.0.0 Construction
7.1.2.0.1.2 Quality Assurance Quality Control Plans/Reports (QAQC Review Process)
8.0.0.0.0.0 Tenant Occupancy



LINKS

Building Cx Guide | Cx Plan | PBS-P100

PPT | Inspections and Testing Schedule 7.1.6.5.0.0

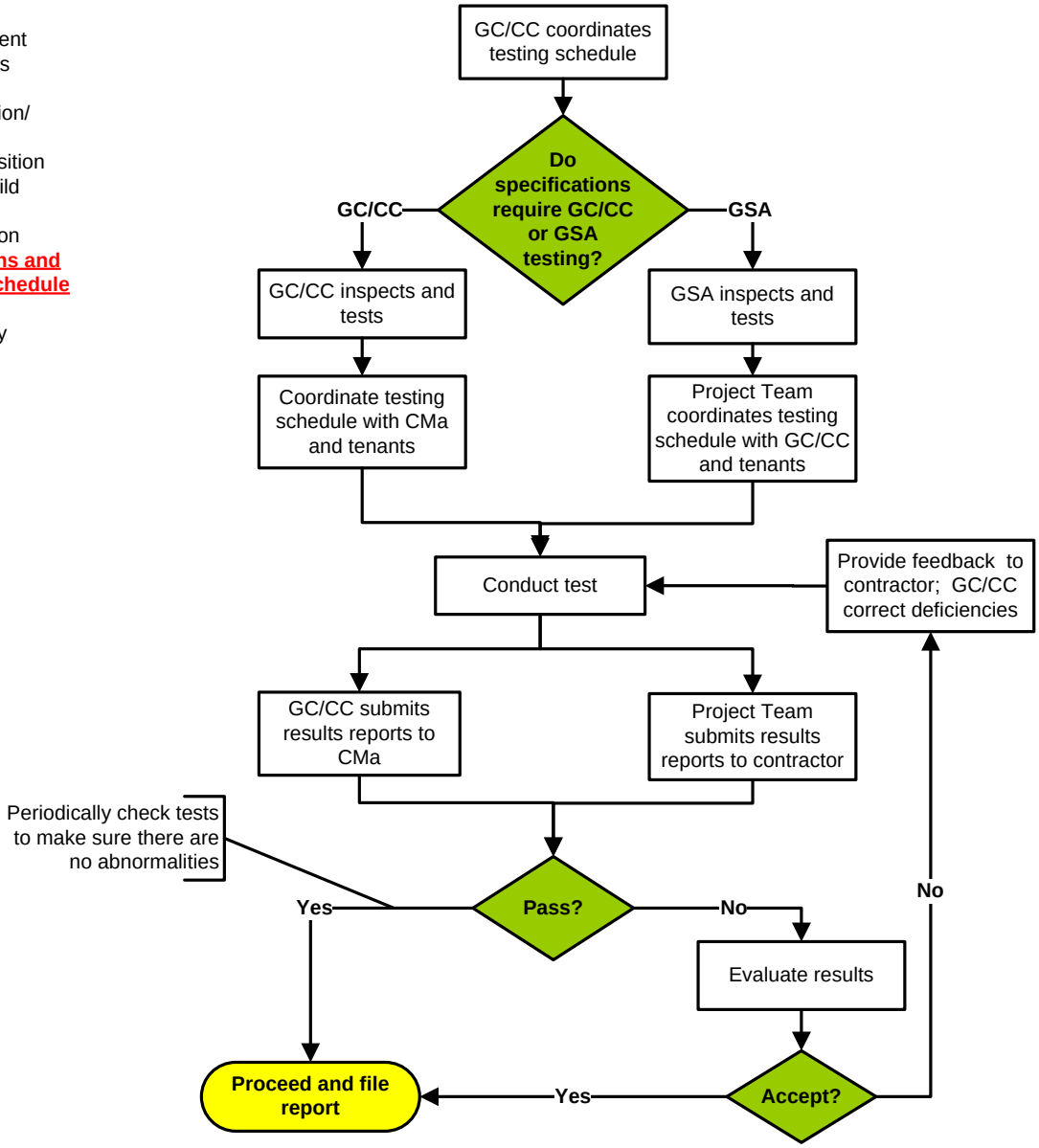
This page applies to:

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

Construction Administration 7.1.6.0.0.0.a

7.0.0.0.0.0 Construction
Traditional
7.1.6.5.0.0 Inspections and Testing Schedule

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
3.0.0.0.0.0 Authorization/ Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design/Build
6.0.0.0.0.0 Design
7.0.0.0.0.0 Construction
7.1.6.5.0.0 Inspections and Testing Schedule
8.0.0.0.0.0 Tenant Occupancy



LINKS

Cx Plan

Quality Control Plan 7.1.2.0.1.2

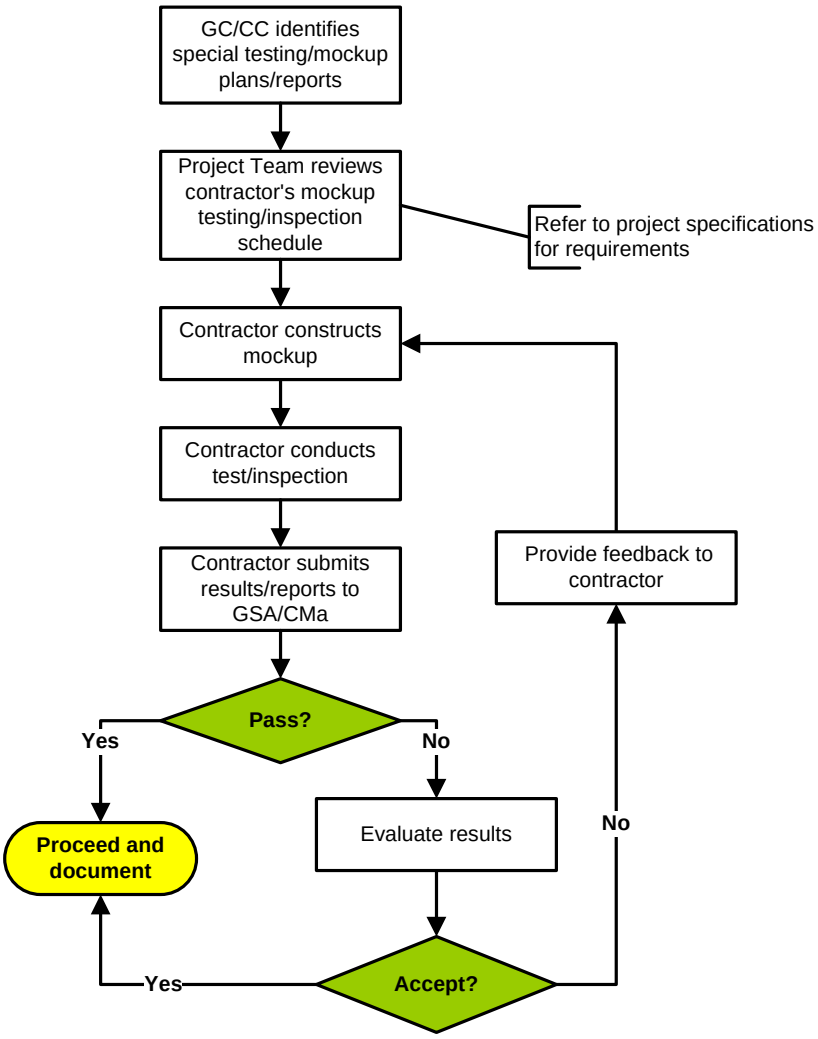
This page applies to:

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

Construction Administration 7.1.6.0.0.0.a

7.0.0.0.0.0 Construction
Traditional
7.1.6.6.0.0 Special Testing/Mock-up Plans/Reports

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
3.0.0.0.0.0 Authorization/ Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design/Build
6.0.0.0.0.0 Design
7.0.0.0.0.0 Construction
7.1.6.6.0.0 Special Testing/ Mock-up Plans/ Reports
8.0.0.0.0.0 Tenant Occupancy

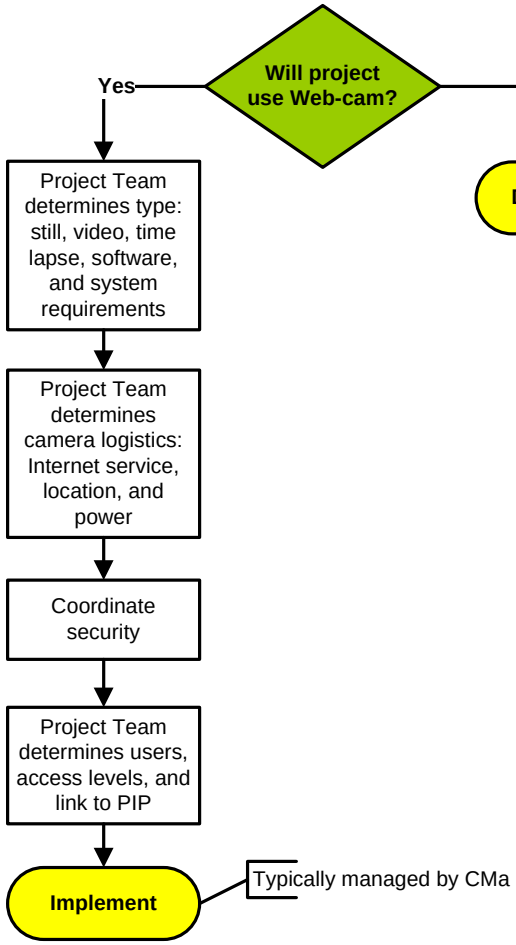


This page applies to:

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

7.0.0.0.0.0 Construction
Traditional
7.1.6.1.1.1 Project Web-Cam

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
3.0.0.0.0.0 Authorization/ Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design/Build
6.0.0.0.0.0 Design
7.0.0.0.0.0 Construction
7.1.6.1.1.1 Project Web-Cam
8.0.0.0.0.0 Tenant Occupancy

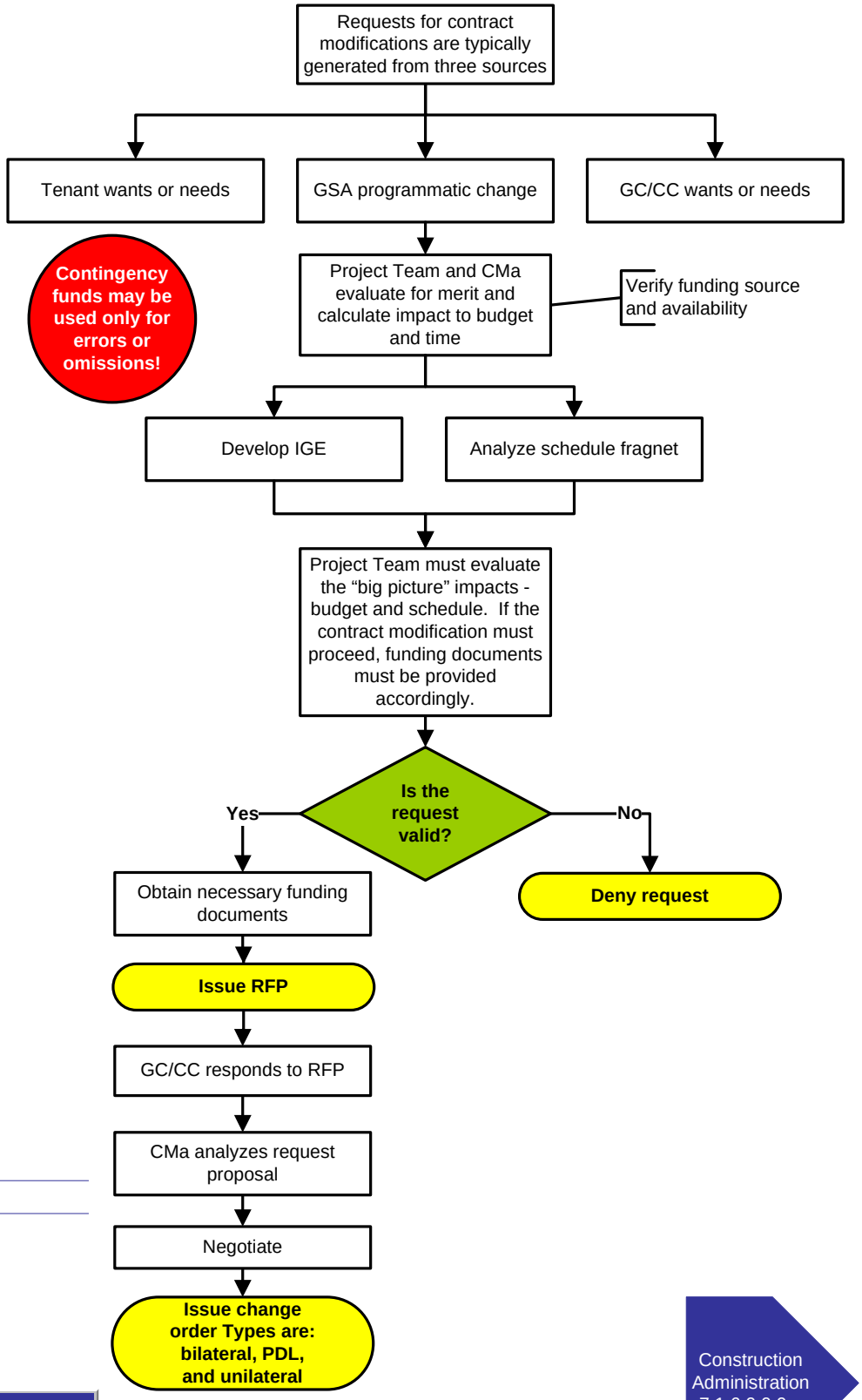


This page applies to:

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

7.0.0.0.0.0 Construction
Traditional
7.1.6.8.0.0 GC/CC Contract Modifications

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
3.0.0.0.0.0 Authorization/ Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design/Build
6.0.0.0.0.0 Design
7.0.0.0.0.0 Construction
7.1.6.8.0.0 GC/CC Contract Modifications
8.0.0.0.0.0 Tenant Occupancy



LINKS

Construction Administration 7.1.6.0.0.0.a
Requests for Information 7.1.6.0.0.1.c

This page applies to:

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

Construction Administration 7.1.6.0.0.0.a

7.0.0.0.0.0.0 Construction
Traditional
7.1.9.0.0.0.0 GC/CC Evaluations (NIH)

1.0.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0.0 Planning
3.0.0.0.0.0.0 Authorization/ Funding
4.0.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0.0 Design/Build
6.0.0.0.0.0.0 Design
7.0.0.0.0.0.0 Construction
7.1.9.0.0.0.0 GC/CC Evaluations (NIH)
8.0.0.0.0.0.0 Tenant Occupancy

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

LINKS

NIH | Sample Evaluation Form

This page applies to:

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

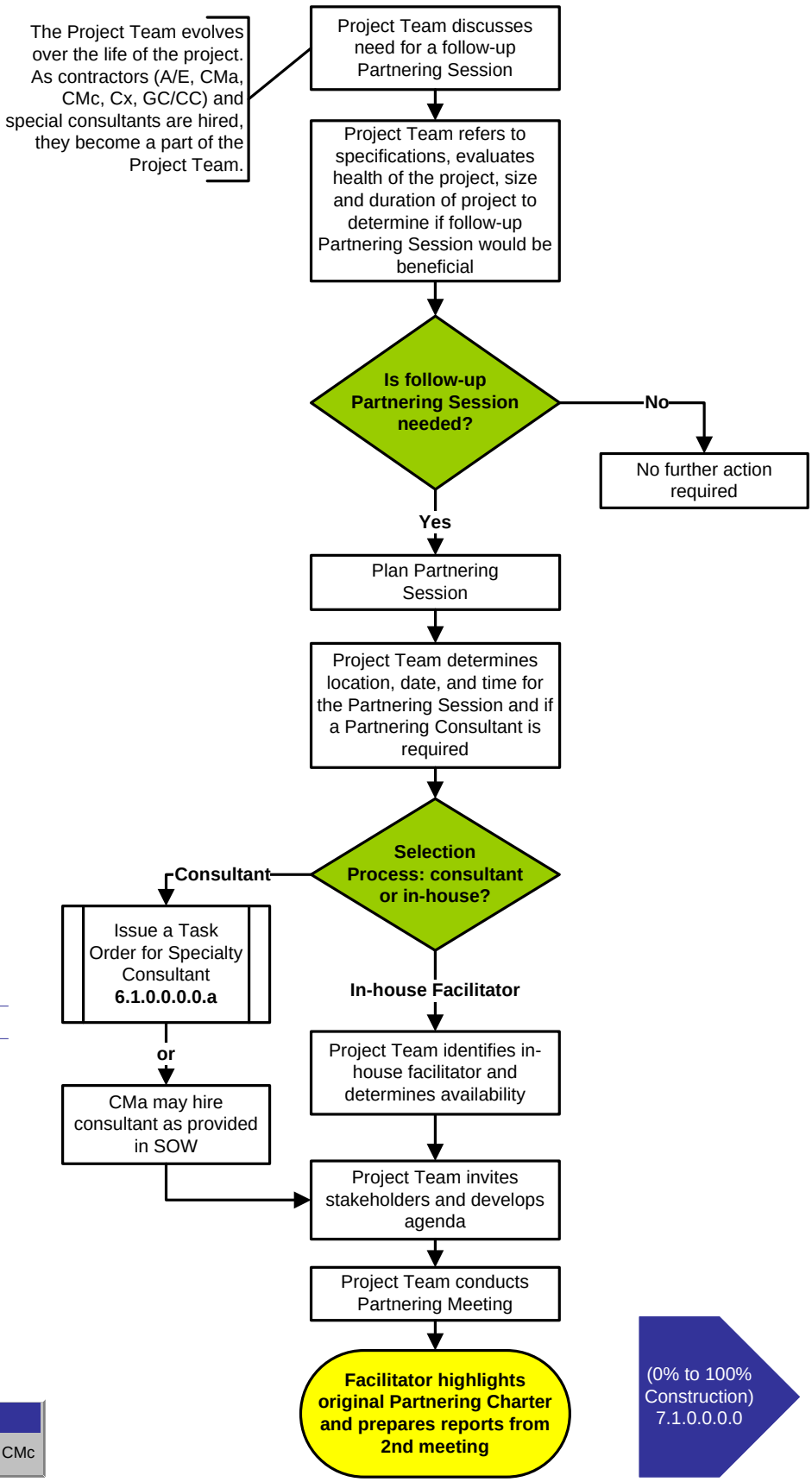
Construction Administration 7.1.6.0.0.0.a

7.1.10.0.0.0 Follow-up Partnering Session

(0% to 100% Construction) 7.1.0.0.0.0

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
7.1.10.0.0.0 Follow-up Partnering Session
8.0.0.0.0.0 Tenant Occupancy

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



LINKS

Sample Charters and Reports

Sample Partnering Session Agenda

Sample Partnering Techniques

Suggested Attendees List

Partnering Session 7.1.3.0.0.0.a

This page applies to:

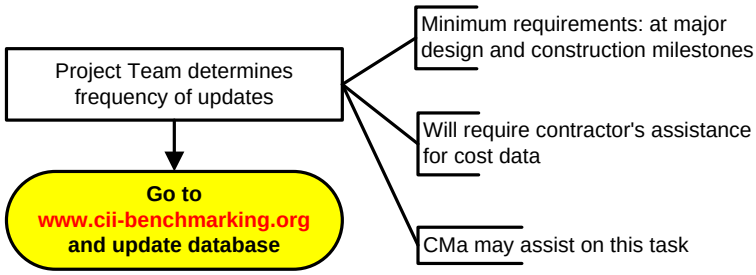
☑ Traditional ☑ D/B ☑ D/B-Bridging ☑ CMc

(0% to 100% Construction) 7.1.0.0.0.0

Construction Administration 7.1.6.0.0.0.a

7.0.0.0.0.0.0 Construction
Traditional
7.1.7.0.0.0.0 CII Benchmarking

1.0.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0.0 Planning
3.0.0.0.0.0.0 Authorization/ Funding
4.0.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0.0 Design/Build
6.0.0.0.0.0.0 Design
7.0.0.0.0.0.0 Construction
7.1.7.0.0.0.0 CII Benchmarking
8.0.0.0.0.0.0 Tenant Occupancy



LINKS

PMP 1.1.1.0.0.0.b
CMa SOW 6.3.1.0.0.0.a

This page applies to:

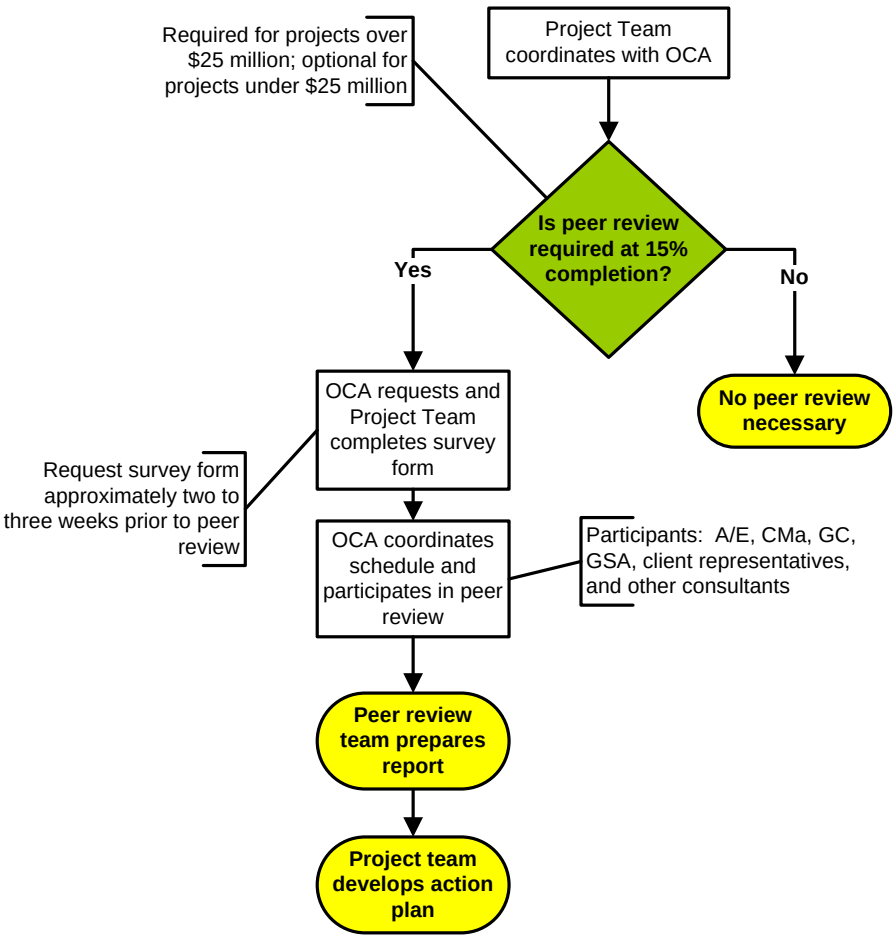
☑ Traditional ☑ D/B ☑ D/B-Bridging ☑ CMc

Construction Administration 7.1.6.0.0.0.a

(0% to 100% Construction)
7.1.0.0.0.0

7.0.0.0.0.0 Construction
Traditional
7.1.8.0.0.0 Construction Excellence Peer Review (1st)
7.1.11.0.0.0 Construction Excellence Peer Review (2nd)

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
7.1.8.0.0.0 Construction Excellence Peer Review (1st Review)
7.1.11.0.0.0 Construction Excellence Peer Review (2nd Review)
8.0.0.0.0.0 Tenant Occupancy



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:

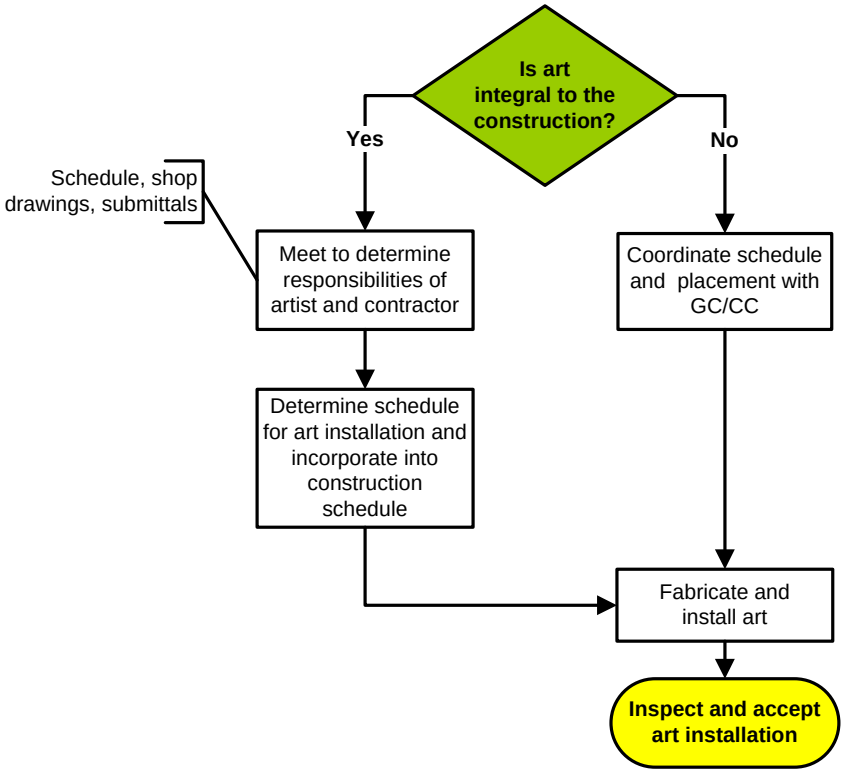
☑ Traditional ☐ D/B ☑ D/B-Bridging ☑ CMc

(0% to 100% Construction)
7.1.0.0.0.0

(0% to 100% Construction)
7.1.0.0.0.0

7.0.0.0.0.0 Construction
Traditional
7.1.12.0.0.0 Art-In-Architecture Deliverable

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
7.1.12.0.0.0 Art-in-Architecture Deliverable
8.0.0.0.0.0 Tenant Occupancy



LINKS

AiA Fabrication Design Task Order
7.1.4.0.0.0

This page applies to:

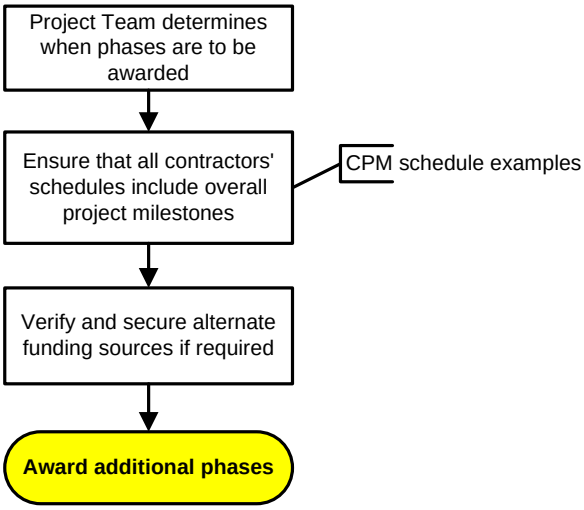
☑ Traditional ☑ D/B ☑ D/B-Bridging ☑ CMc

(0% to 100% Construction)
7.1.0.0.0.0

(0% to 100% Construction) 7.1.0.0.0.0

7.0.0.0.0.0 Construction
Traditional
7.1.13.0.0.0 Additional Phases Delivery (TI, Phases, Annexes)

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



This page applies to:

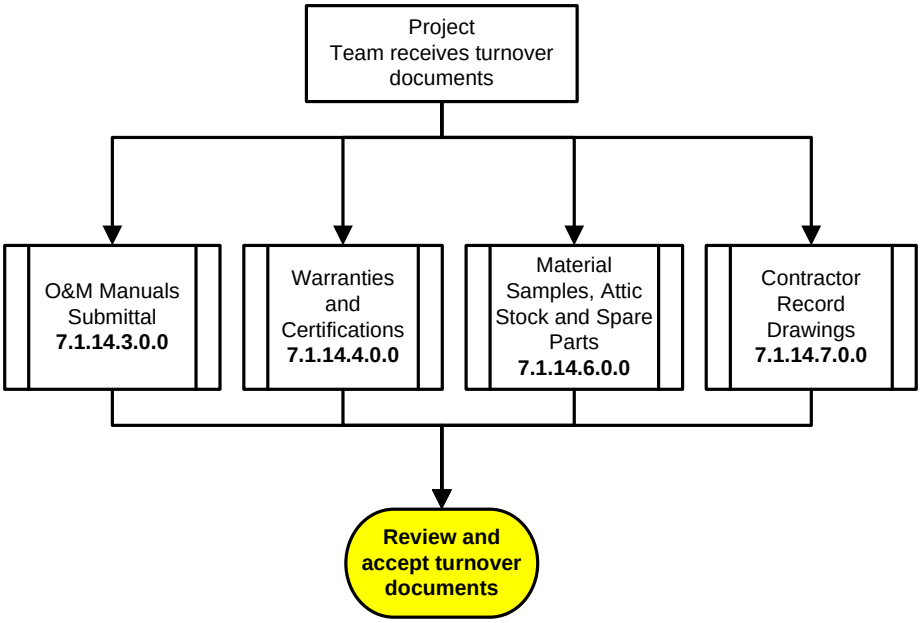
☑ Traditional ☐ D/B ☑ D/B-Bridging ☑ CMc

(0% to 100% Construction) 7.1.0.0.0.0

(0% to 100% Construction)
7.1.0.0.0.0

7.0.0.0.0.0 Construction
Traditional
7.1.14.0.0.0 Turnover Documents

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



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

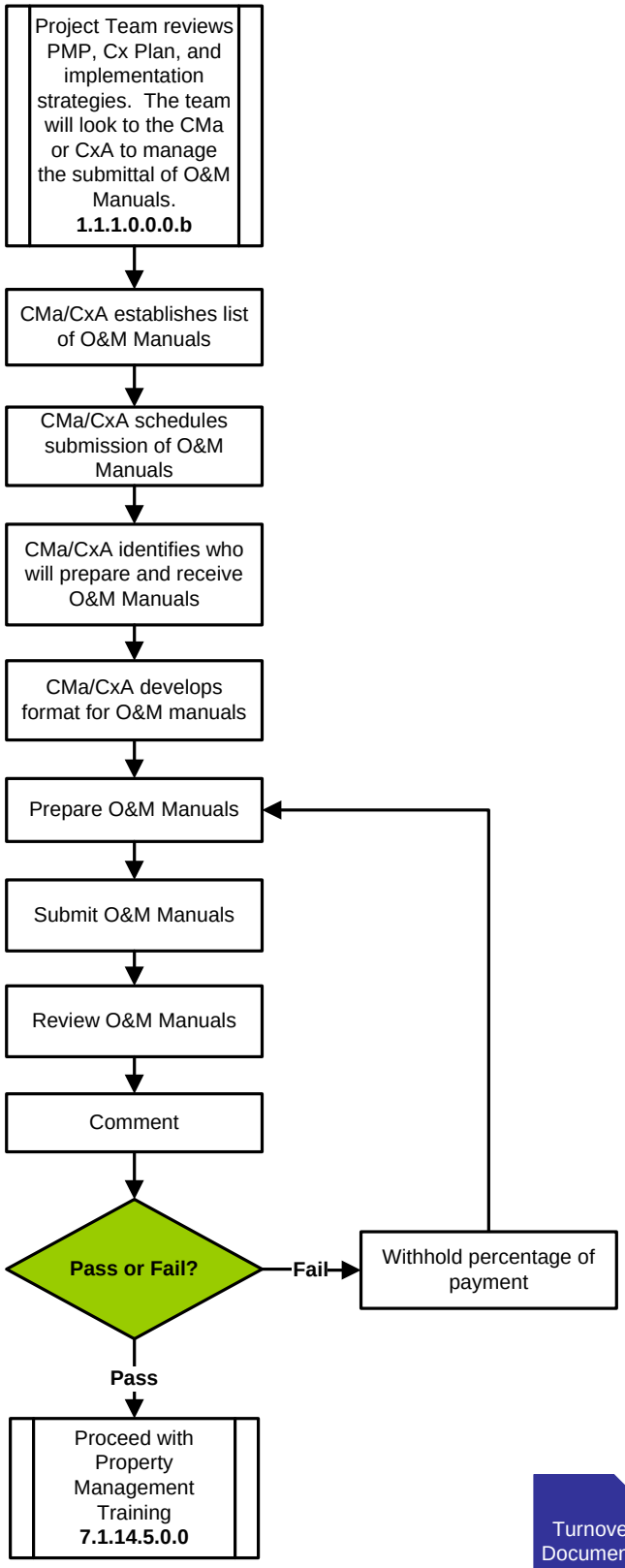
This page applies to:

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

Substantial Completion Certification 7.1.15.0.0.0.a

7.0.0.0.0.0 Construction
Traditional
7.1.14.3.0.0 O&M Manuals Submittal

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
7.1.14.3.0.0 O&M Manuals Submittal
8.0.0.0.0.0 Tenant Occupancy



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:

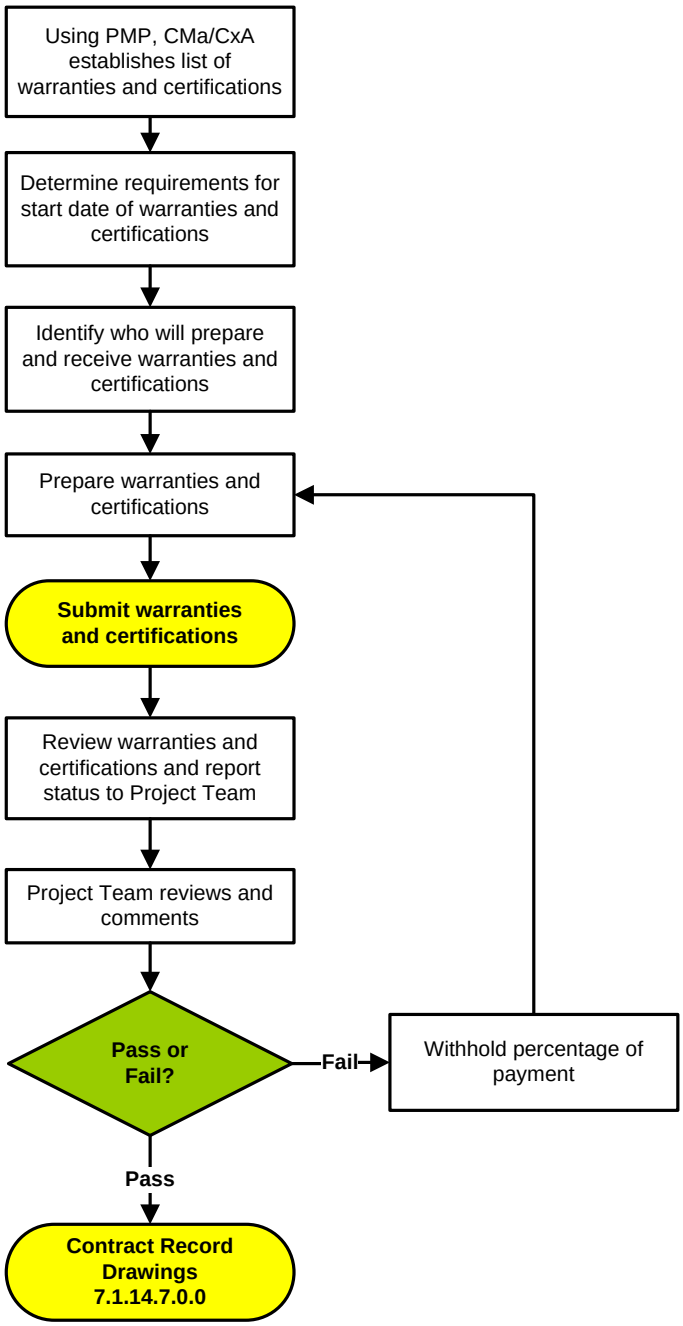
☑ Traditional ☑ D/B ☑ D/B-Bridging ☑ CMc

Turnover Documents 7.1.14.0.0.0

7.1.14.4.0.0 Warranties and Certifications

Turnover Documents 7.1.14.0.0.0

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
7.1.14.4.0.0 Warranties and Certifications
8.0.0.0.0.0 Tenant Occupancy



LINKS

Cx Plan | PMP Reference

Submittal Schedule/Logs/ Submissions 7.1.6.4.0.0

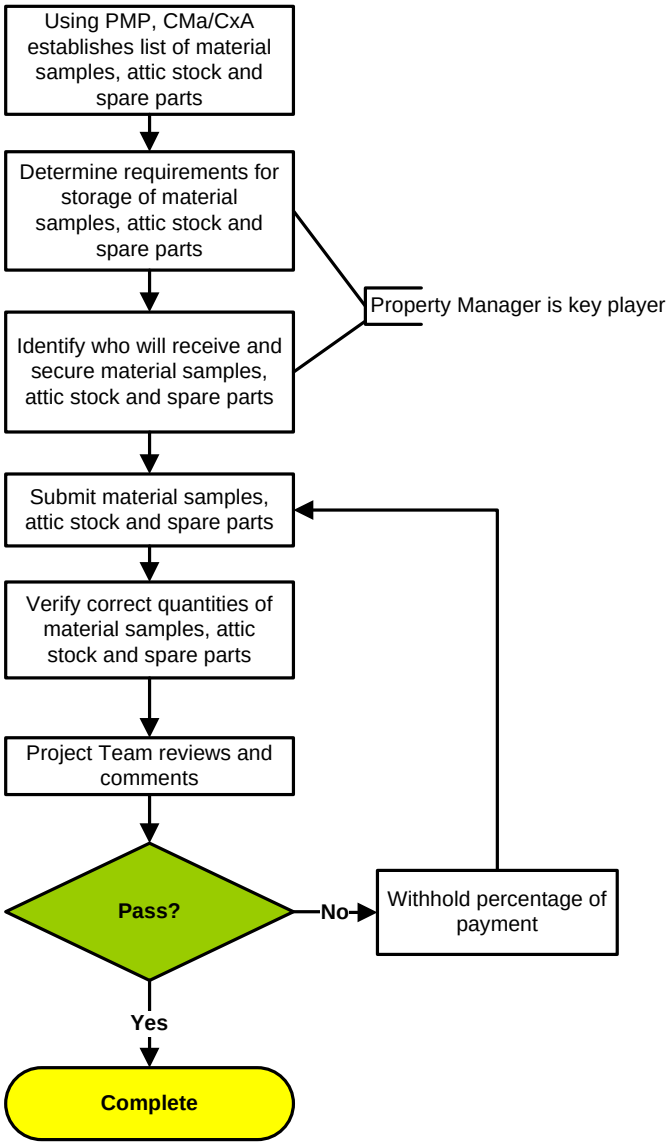
This page applies to:

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

Turnover Documents 7.1.14.0.0.0

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
7.1.14.6.0.0 Material Samples, Attic Stock and Spare Parts
8.0.0.0.0.0 Tenant Occupancy



LINKS

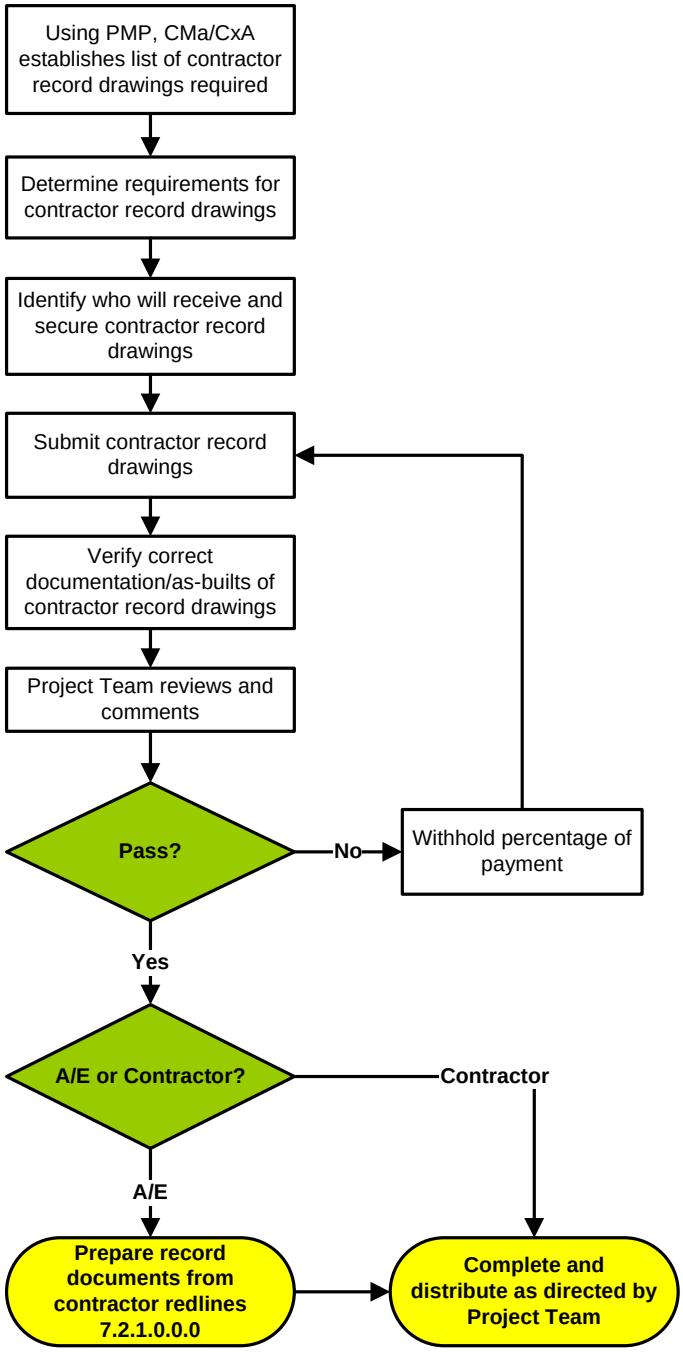
PMP Reference

This page applies to:

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

7.0.0.0.0.0 Construction
Traditional
7.1.14.7.0.0 Contractor Record Drawings

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
7.1.14.7.0.0 Contractor Record Drawings
8.0.0.0.0.0 Tenant Occupancy



LINKS

PMP Reference

A/E Contract for Design 6.2.6.0.0.0

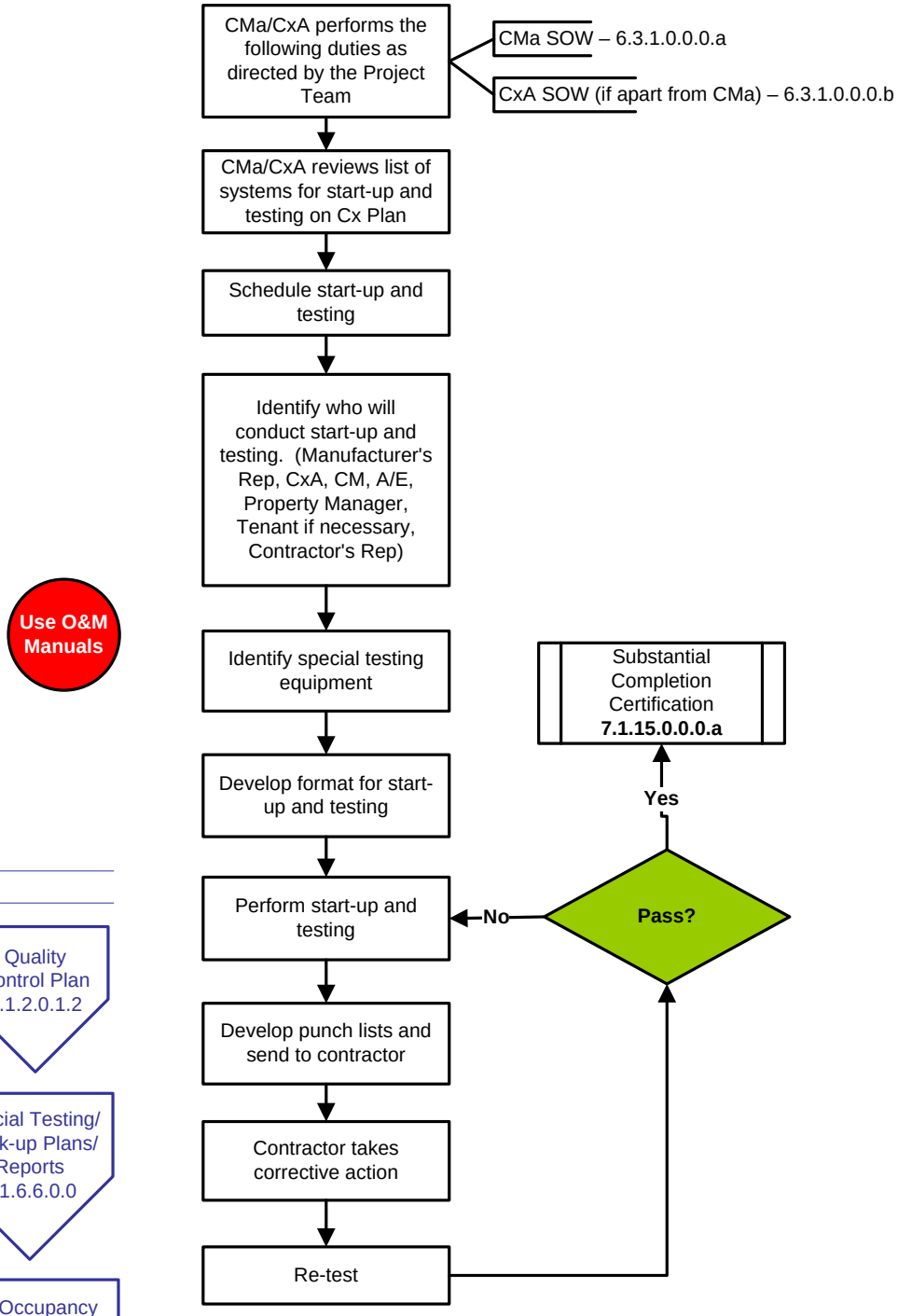
This page applies to:

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

Turnover Documents 7.1.14.0.0.0

7.1.14.2.0.0 Systems Start-Up and Testing (Commissioning)

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
3.0.0.0.0.0 Authorization/ Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design/Build
6.0.0.0.0.0 Design
7.0.0.0.0.0 Construction
7.1.14.2.0.0 Systems Start-Up and Testing (Commissioning)
8.0.0.0.0.0 Tenant Occupancy



Use O&M Manuals

LINKS

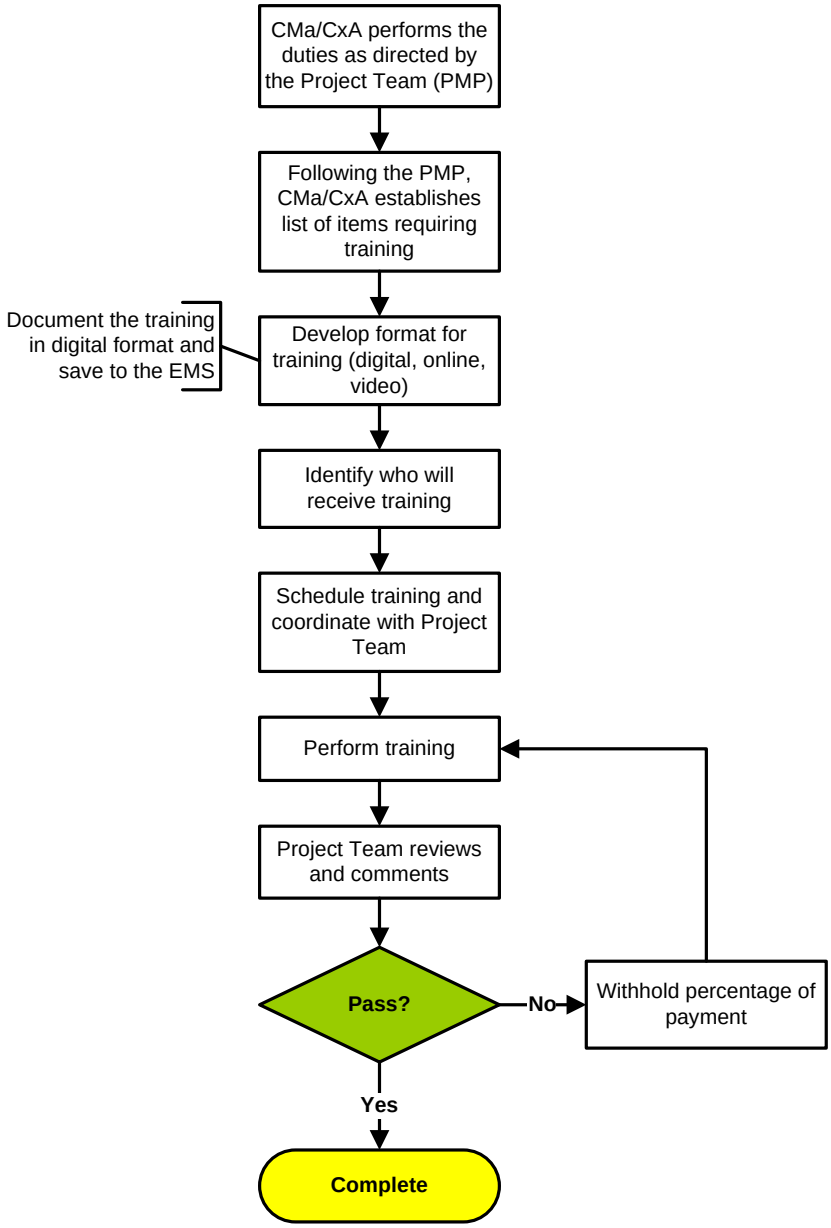
Cx Plan
PMP Reference
Quality Control Plan 7.1.2.0.1.2
Submittal Schedule/Log/ Submissions 7.1.6.4.0.0
Inspections and Testing Schedule 7.1.6.5.0.0
Special Testing/ Mock-up Plans/ Reports 7.1.6.6.0.0
Turnover Documents 7.1.14.0.0.0
Substantial Competition Certificate: Final Completion 7.1.15.0.0.0.c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

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

Property Management Training 7.1.14.5.0.0

7.0.0.0.0.0 Construction
Traditional
7.1.14.5.0.0 Property Management Training

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
7.1.14.5.0.0 Property Management Training
8.0.0.0.0.0 Tenant Occupancy



LINKS

Cx Plan

O&M Manual Submittals 7.1.14.3.0.0

This page applies to:

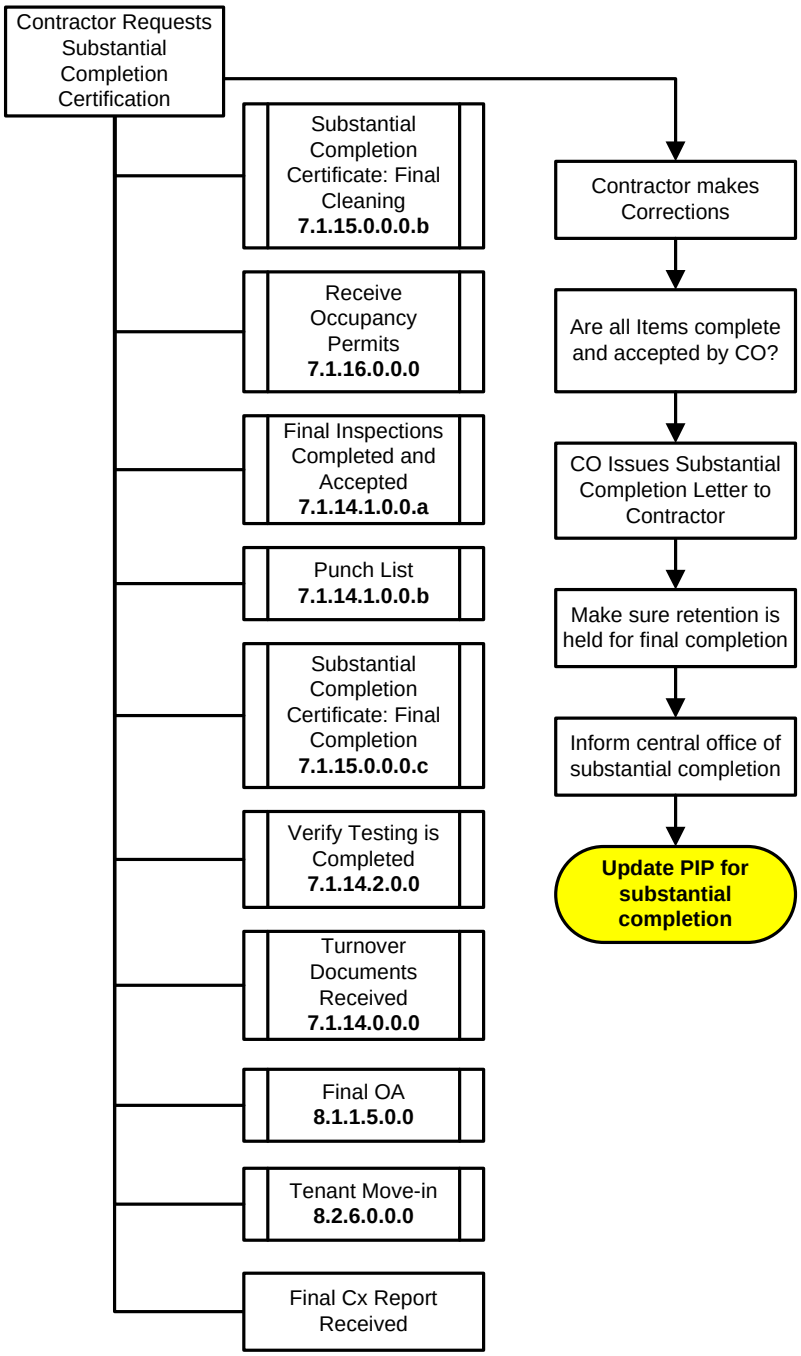
☑ Traditional ☑ D/B ☑ D/B-Bridging ☑ CMc

Turnover Documents 7.1.14.0.0.0

7.1.15.0.0.0.a Substantial Completion Certification

Turnover Documents 7.1.14.0.0.0

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



LINKS

O&M Manual Submittals 7.1.14.3.0.0

Closeout (Admin) 7.2.0.0.0.0

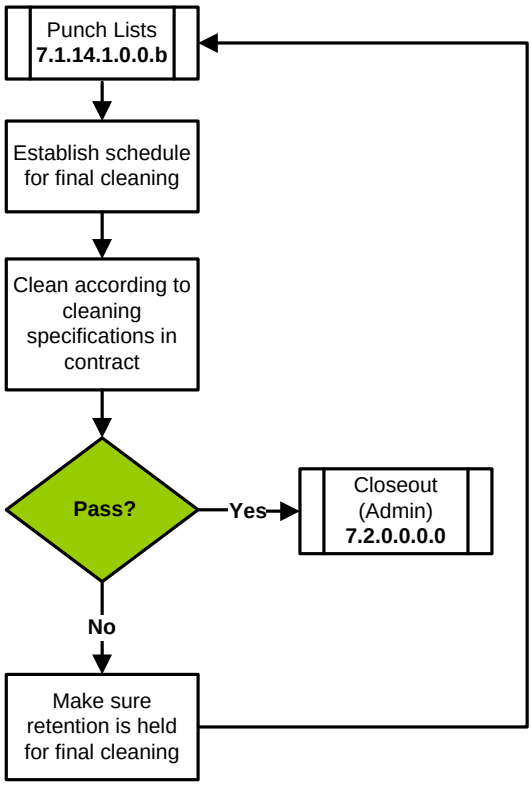
This page applies to:

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

Substantial Completion Certification 7.1.15.0.0.0.a

7.1.15.0.0.0.b Substantial Completion Certificate: Final Cleaning

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



LINKS

Substantial Completion Certificate: Final Completion 7.1.15.0.0.0.c

This page applies to:

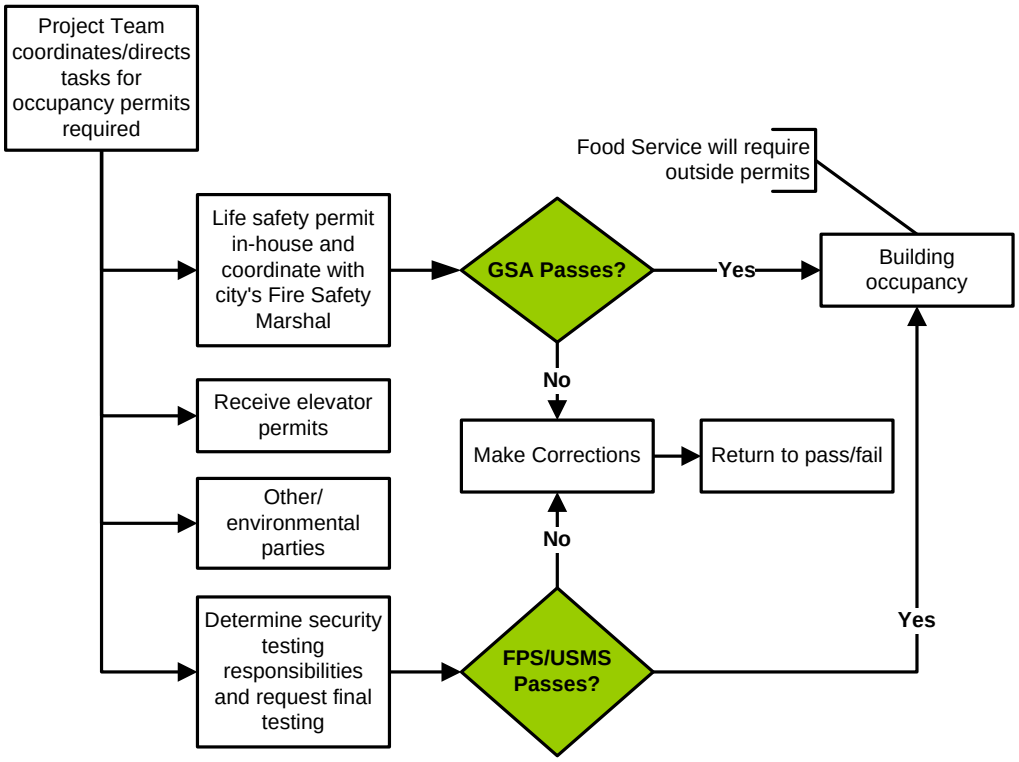
☑ Traditional ☑ D/B ☑ D/B-Bridging ☑ CMc

Substantial Completion Certification 7.1.15.0.0.0.a

Substantial Completion Certification 7.1.15.0.0.0.a

7.0.0.0.0.0 Construction
Traditional
7.1.16.0.0.0 Occupancy Permit

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
7.1.16.0.0.0 Occupancy Permit
8.0.0.0.0.0 Tenant Occupancy



LINKS

Punch Lists 7.1.14.1.0.0.b

Systems Startup and Testing 7.1.14.2.0.0

O&M Manual Submittals 7.1.14.3.0.0

Substantial Completion Certificate Final Completion 7.1.15.0.0.0.c

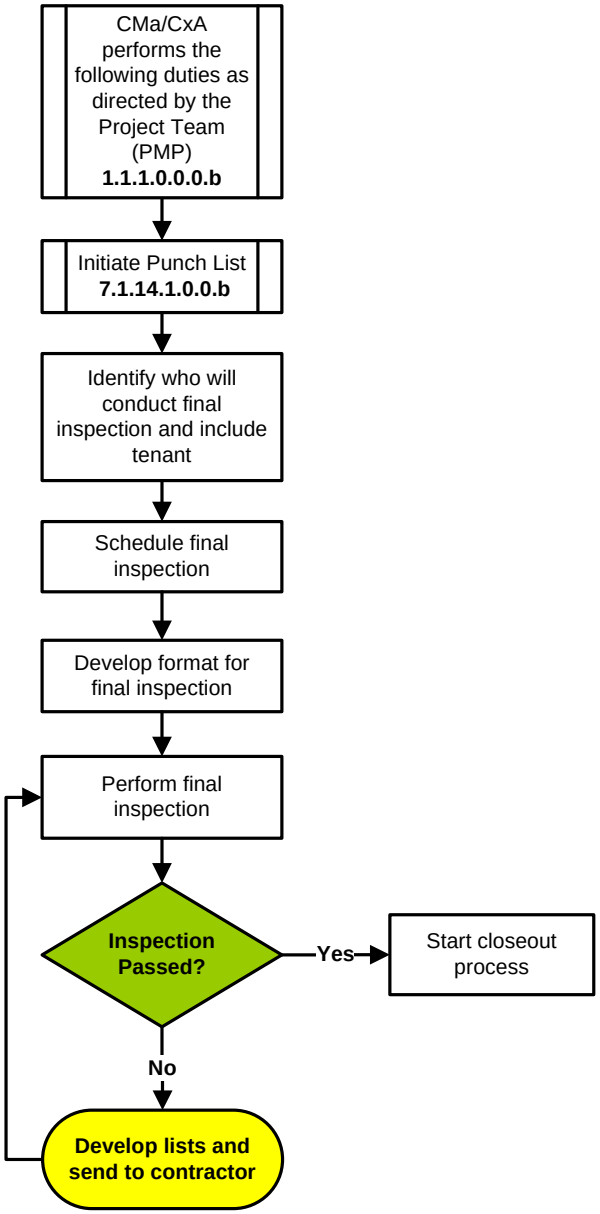
This page applies to:

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

Substantial Completion Certification 7.1.15.0.0.0.a

7.0.0.0.0.0 Construction
Traditional
7.1.14.1.0.0.a Final Inspections

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



LINKS

PMP Reference

Turnover Documents 7.1.14.0.0.0

Substantial Completion Certificate Final Completion 7.1.15.0.0.0.c

This page applies to:

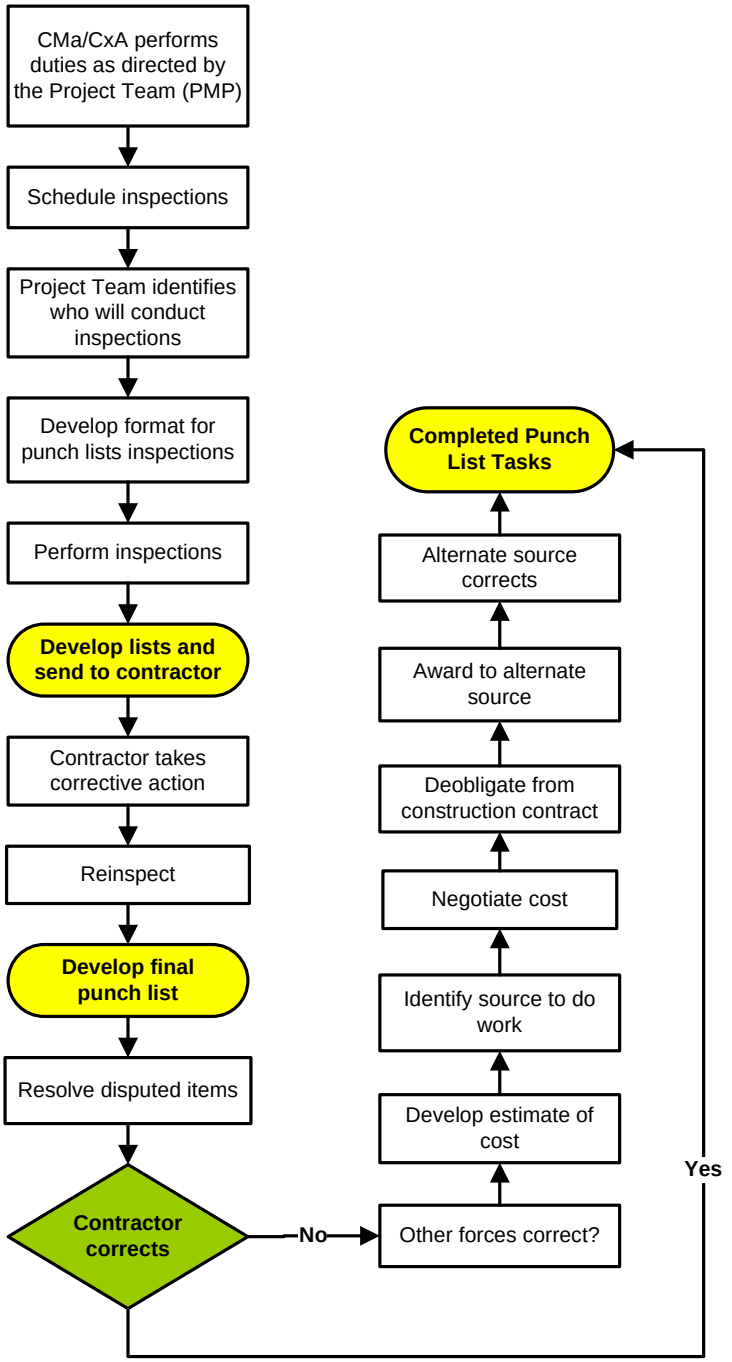
☑ Traditional ☑ D/B ☑ D/B-Bridging ☑ CMc

Substantial Completion Certification 7.1.15.0.0.0.a

Substantial Completion Certification 7.1.15.0.0.0.a

7.0.0.0.0.0 Construction
Traditional
7.1.14.1.0.0.b Punch Lists

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



LINKS

Turnover Documents 7.1.14.0.0.0

Final Inspections 7.1.14.1.0.0.a

Substantial Completion Certificate: Final Completion 7.1.15.0.0.0.c

Occupancy Permit 7.1.16.0.0.0

This page applies to:

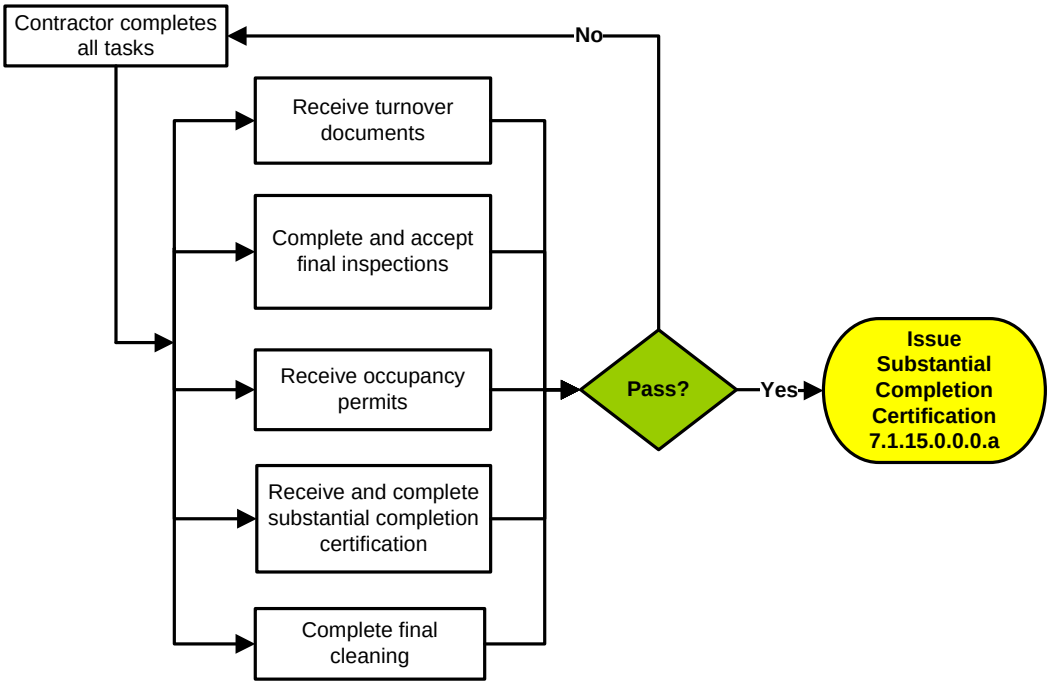
☑ Traditional ☑ D/B ☑ D/B-Bridging ☑ CMc

Substantial Completion Certification 7.1.15.0.0.0.a

Substantial Completion Certification 7.1.15.0.0.0.a

7.0.0.0.0.0 Construction
Traditional
7.1.15.0.0.0.c Substantial Completion Certificate: Final Completion

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



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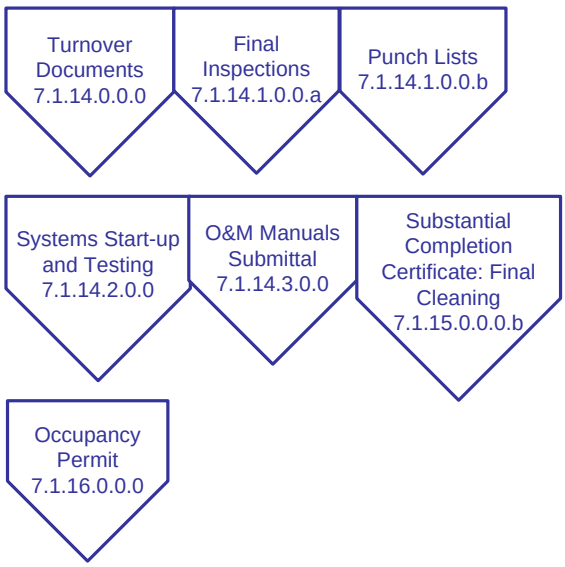


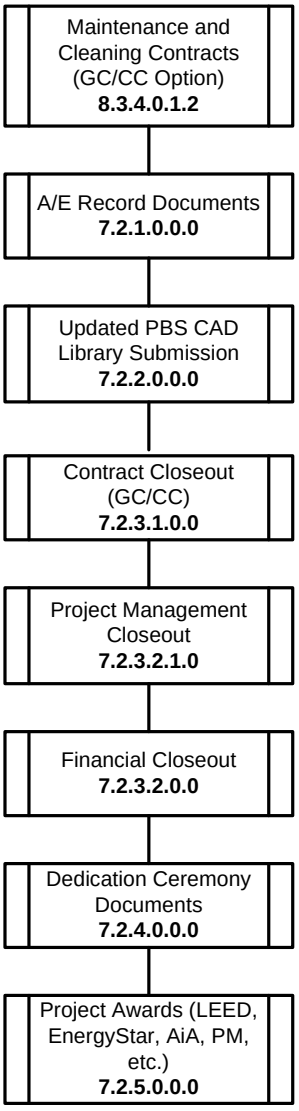
This page applies to:

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

Substantial Completion Certification 7.1.15.0.0.0.a

7.0.0.0.0.0 Construction
Traditional
7.2.0.0.0.0 Closeout (Admin)

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



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

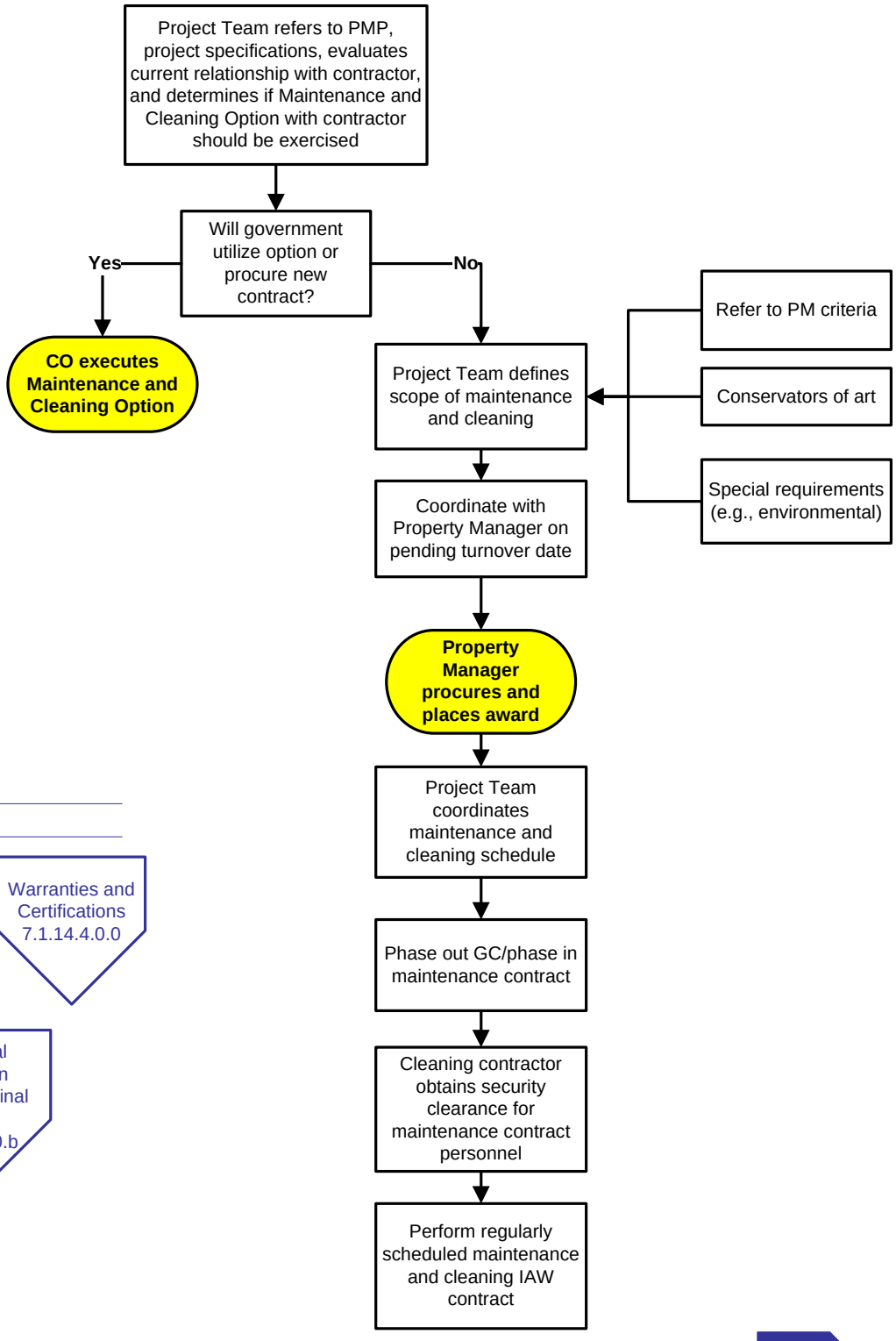
This page applies to:

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

Tenant Occupancy 8.0.0.0.0.0

7.0.0.0.0.0 Construction
Traditional
8.3.4.0.1.2 Maintenance and Cleaning Contracts (GC/CC Option)

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
8.3.4.0.1.2 Maintenance and Cleaning Contracts (GC/CC Option)
8.0.0.0.0.0 Tenant Occupancy



LINKS

PMP Reference

O&M Manuals Submittal 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 Completion 7.1.15.0.0.0.c

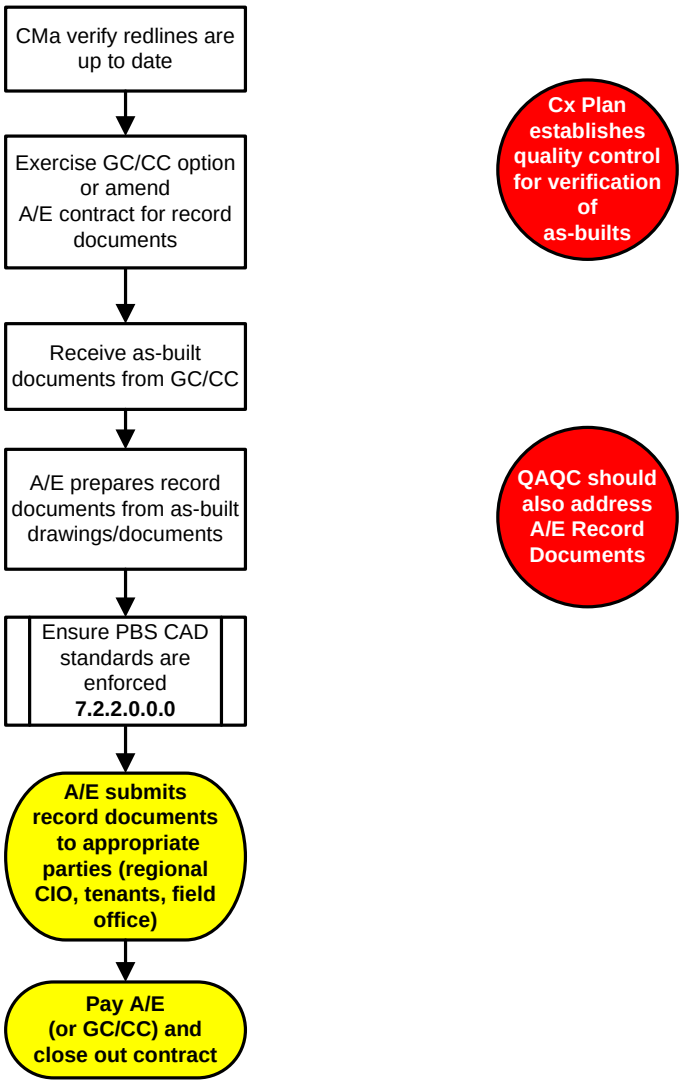
This page applies to:

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

Contract Closeout (GC/CC) 7.2.3.1.0.0

7.0.0.0.0.0 Construction
Traditional
7.2.1.0.0.0 A/E Record Documents

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



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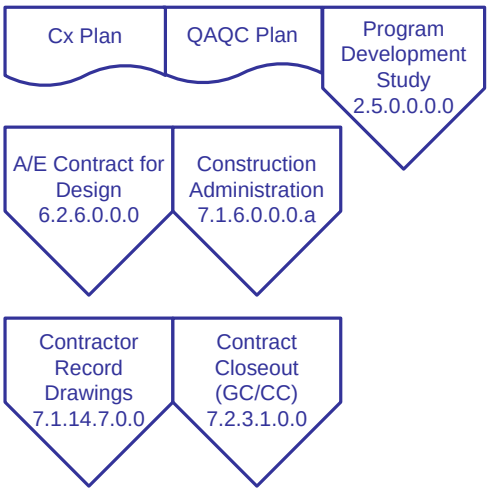


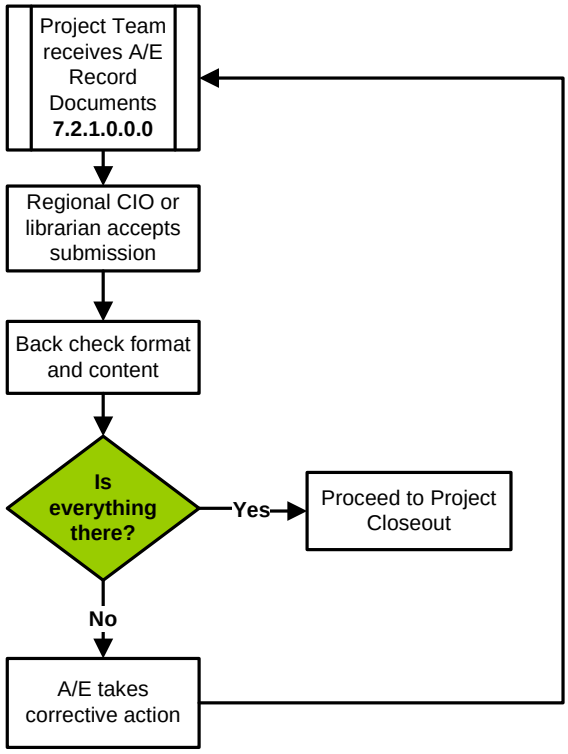
This page applies to:

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

Closeout (Admin) 7.2.0.0.0.0

7.0.0.0.0.0 Construction
Traditional
7.2.2.0.0.0 Updated PBS CAD Library Submission

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
3.0.0.0.0.0 Authorization/ Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design/Build
6.0.0.0.0.0 Design
7.0.0.0.0.0 Construction
7.2.2.0.0.0 Updated PBS CAD Library Submission
8.0.0.0.0.0 Tenant Occupancy

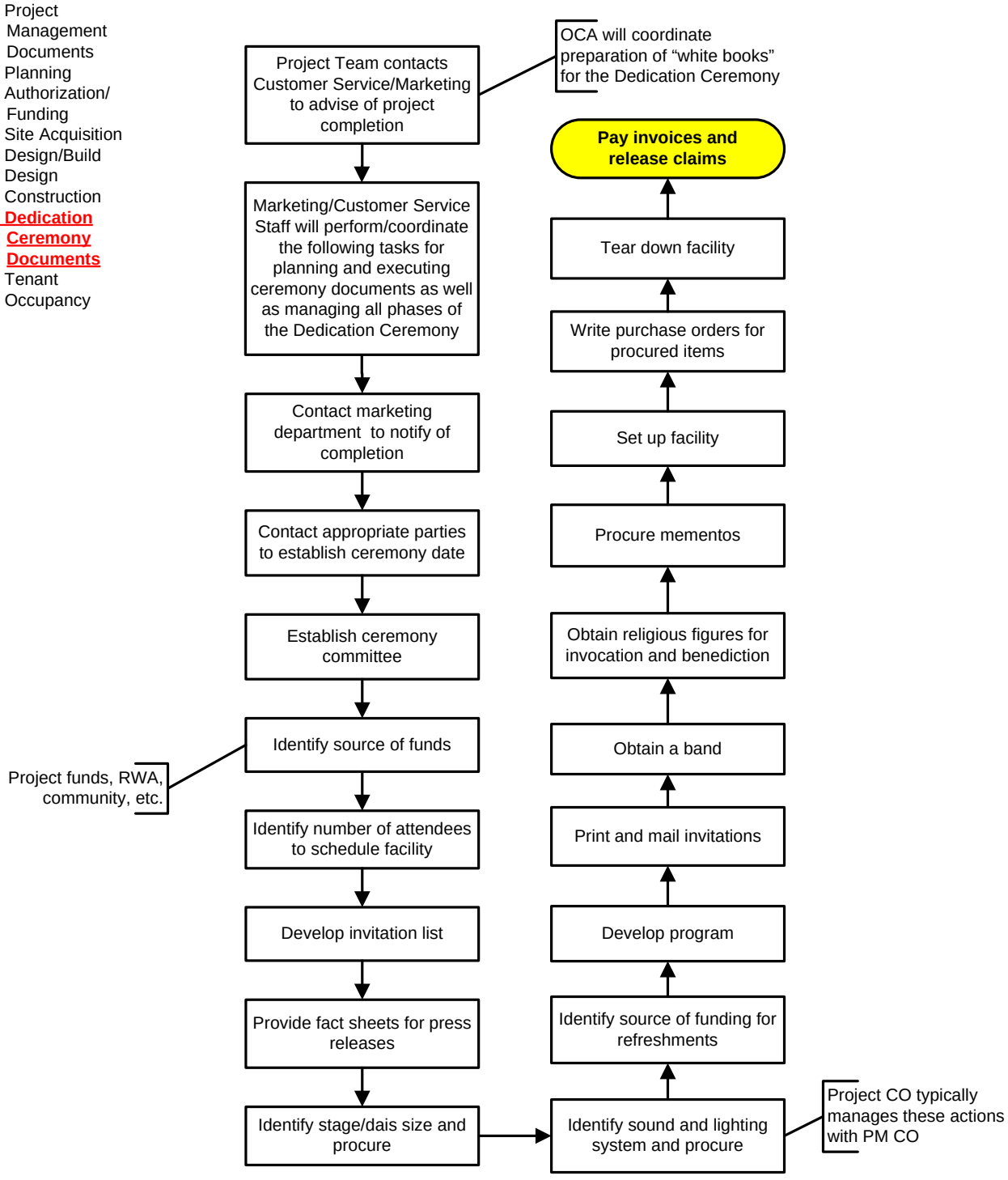


QAQC should address CAD Library submissions

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

7.0.0.0.0.0 Construction
Traditional
7.2.4.0.0.0 Dedication Ceremony Documents

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

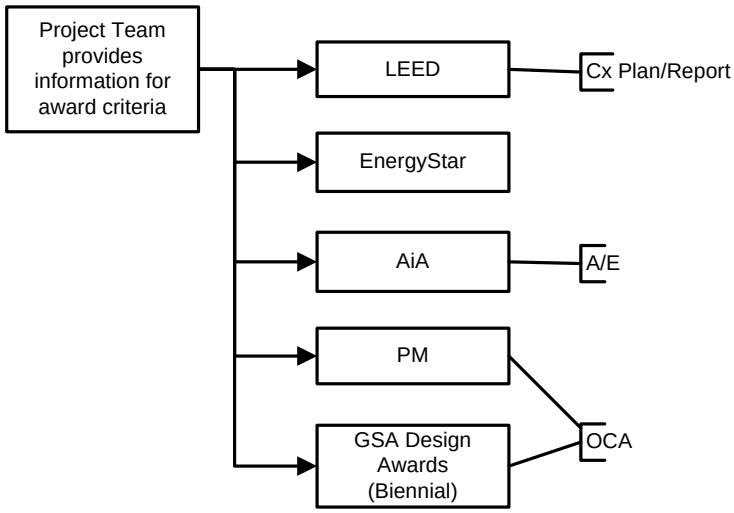


This page applies to:

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

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

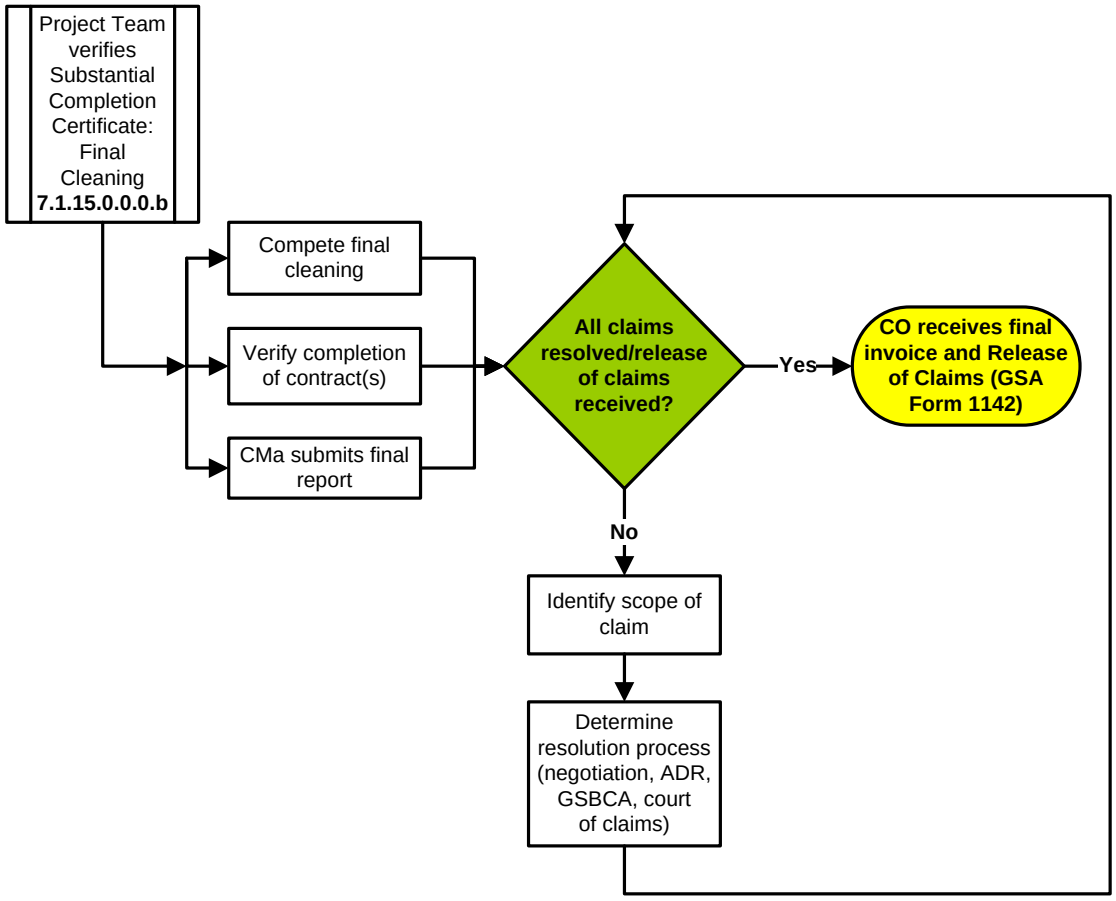
1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
3.0.0.0.0.0 Authorization/ Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design/Build
6.0.0.0.0.0 Design
7.0.0.0.0.0 Construction
7.2.5.0.0.0 Project Awards (LEED, EnergyStar, AiA, PM, etc.)
8.0.0.0.0.0 Tenant Occupancy



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

7.0.0.0.0.0 Construction
Traditional
7.2.3.1.0.0 Contract Closeout (GC/CC)

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
3.0.0.0.0.0 Authorization/ Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design/Build
6.0.0.0.0.0 Design
7.0.0.0.0.0 Construction
7.2.3.1.0.0 Contract Closeout (GC/CC)
8.0.0.0.0.0 Tenant Occupancy



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

7.0.0.0.0.0 Construction
Traditional
7.2.3.2.1.0 Project Management Closeout

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

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 NIH evaluations 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

Some of these processes/ tasks are concurrent

LINKS

Professional Services Estimating Tool

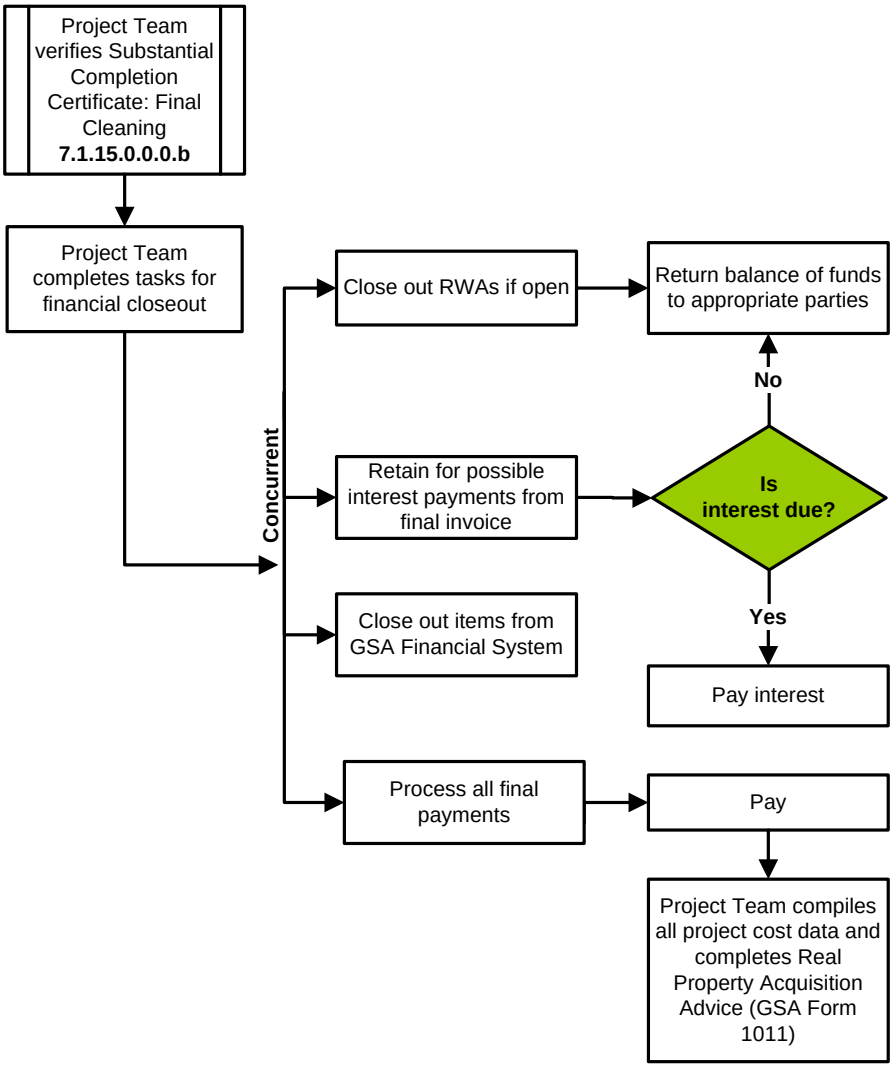
GC/CC Evaluations (NIH) 7.1.9.0.0.0

This page applies to:

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

Closeout (Admin) 7.2.0.0.0.0

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



LINKS

RWA

This page applies to:

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

Real Property Acquisition Advice (GSA Form 1011) 8.1.3.0.1.0

Financial Closeout 7.2.3.2.0.0

7.0.0.0.0.0 Construction
Traditional
8.1.3.0.1.0 Real Property Acquisition Advice (GSA Form 1011)

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

LINKS

GSA Form 1011
OAs and RENT (Overview) 8.1.0.0.0.0
National CAD/CIFM Standards 8.1.2.0.0.0

This page applies to:

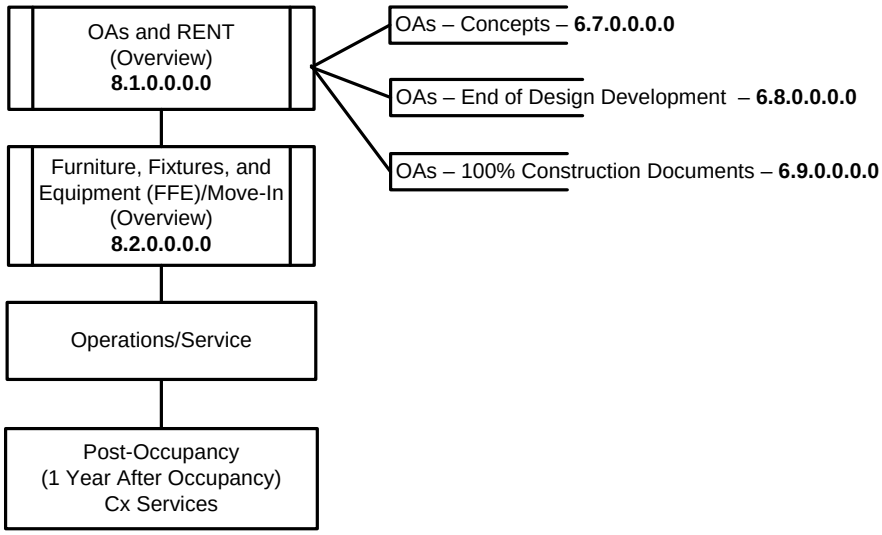
☑ Traditional ☑ D/B ☑ D/B-Bridging ☐ CMc

Financial Closeout 7.2.3.2.0.0

Pre-Project (Preliminary) Planning 2.1.0.0.0.1

8.0.0.0.0.0 Tenant Occupancy
Traditional
8.0.0.0.0.0 Tenant Occupancy

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



This page applies to:

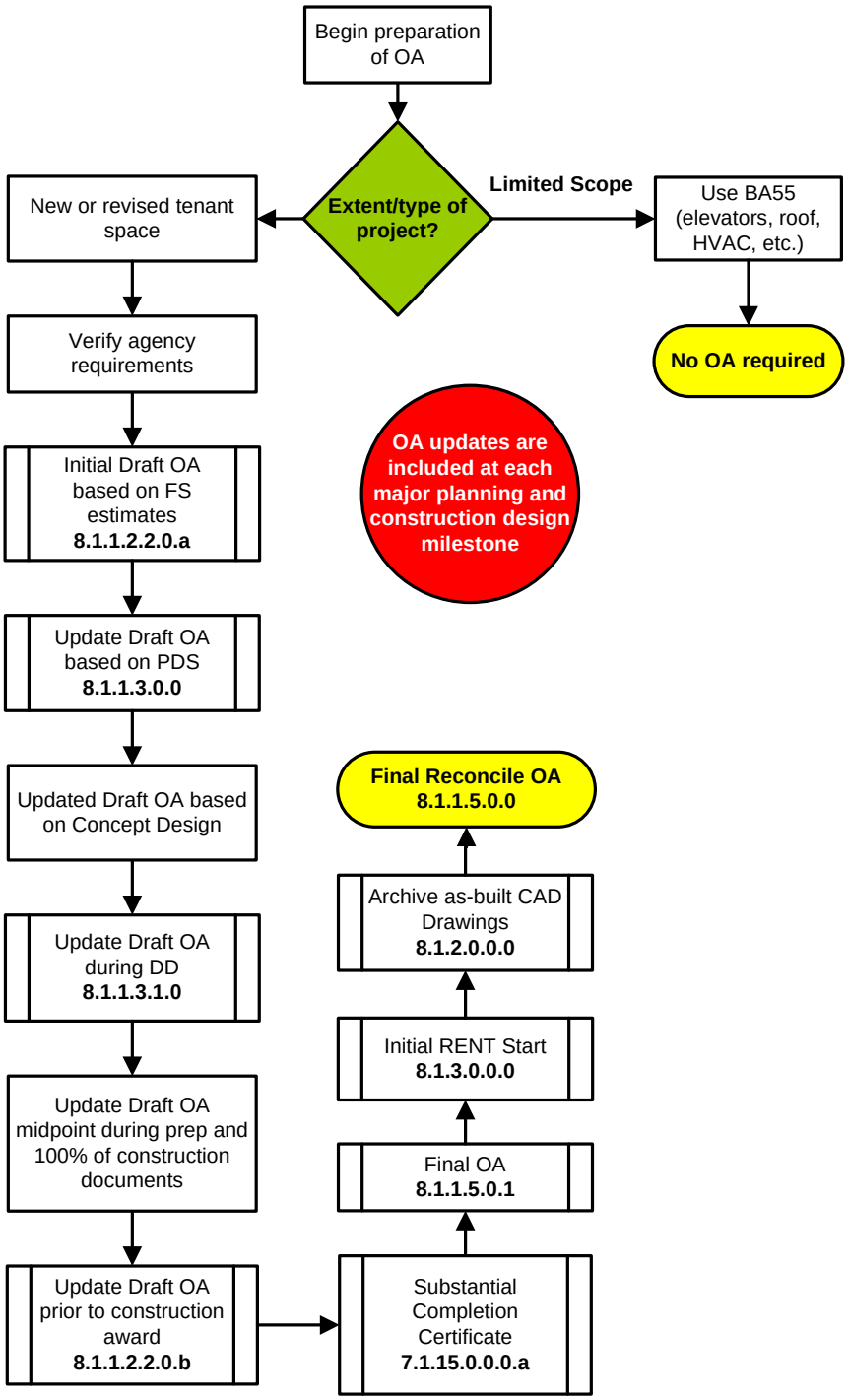
☑ Traditional ☑ D/B ☑ D/B-Bridging ☑ CMc

OAs and RENT (Overview) 8.1.0.0.0.0

8.1.0.0.0.0 Occupancy Agreements and RENT (Overview)

Pre-Project (Preliminary) Planning 2.1.0.0.0.1

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
3.0.0.0.0.0 Authorization/ Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design/Build
6.0.0.0.0.0 Design
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy
8.1.0.0.0.0 Occupancy Agreements and RENT (Overview)



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:

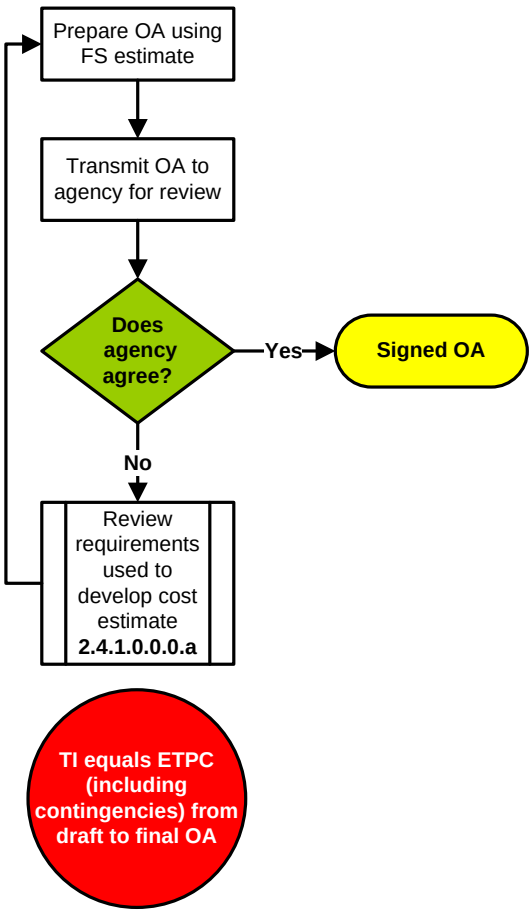
☑ Traditional ☐ D/B ☑ D/B-Bridging ☑ CMc

OA Planning Phase (Initial Draft) 8.1.1.2.2.0.b

OAs and RENT (Overview) 8.1.0.0.0.0

8.0.0.0.0.0 Tenant Occupancy
Traditional
8.1.1.2.2.0.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
8.1.1.2.2.0.a Occupancy Agreement Planning Phase (Initial Draft)



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:

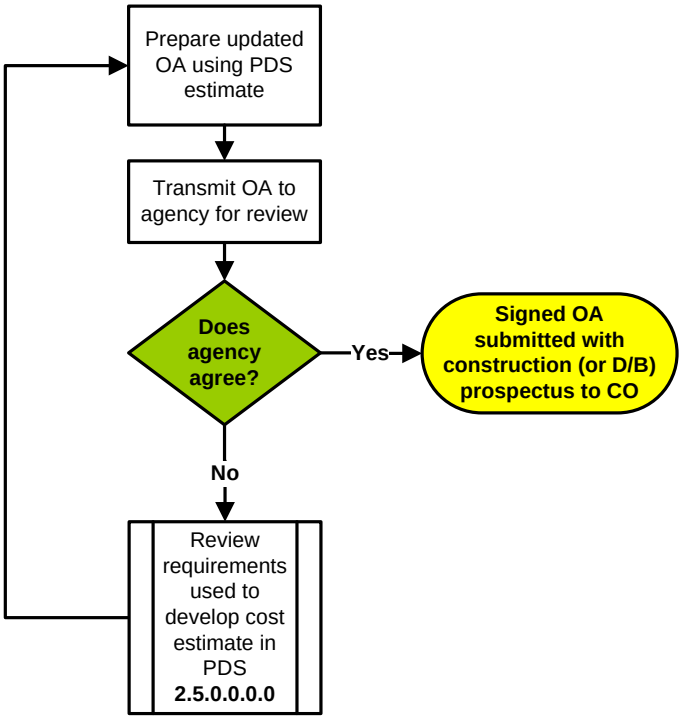
☑ Traditional ☑ D/B ☑ D/B-Bridging ☑ CMc

OAs and RENT (Overview) 8.1.0.0.0.0

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

OA Planning Phase (Initial Draft) 8.1.1.2.2.0.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
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy
8.1.1.3.0.0 Occupancy Agreement based on PDS-(Proposed Draft)/Updates



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:

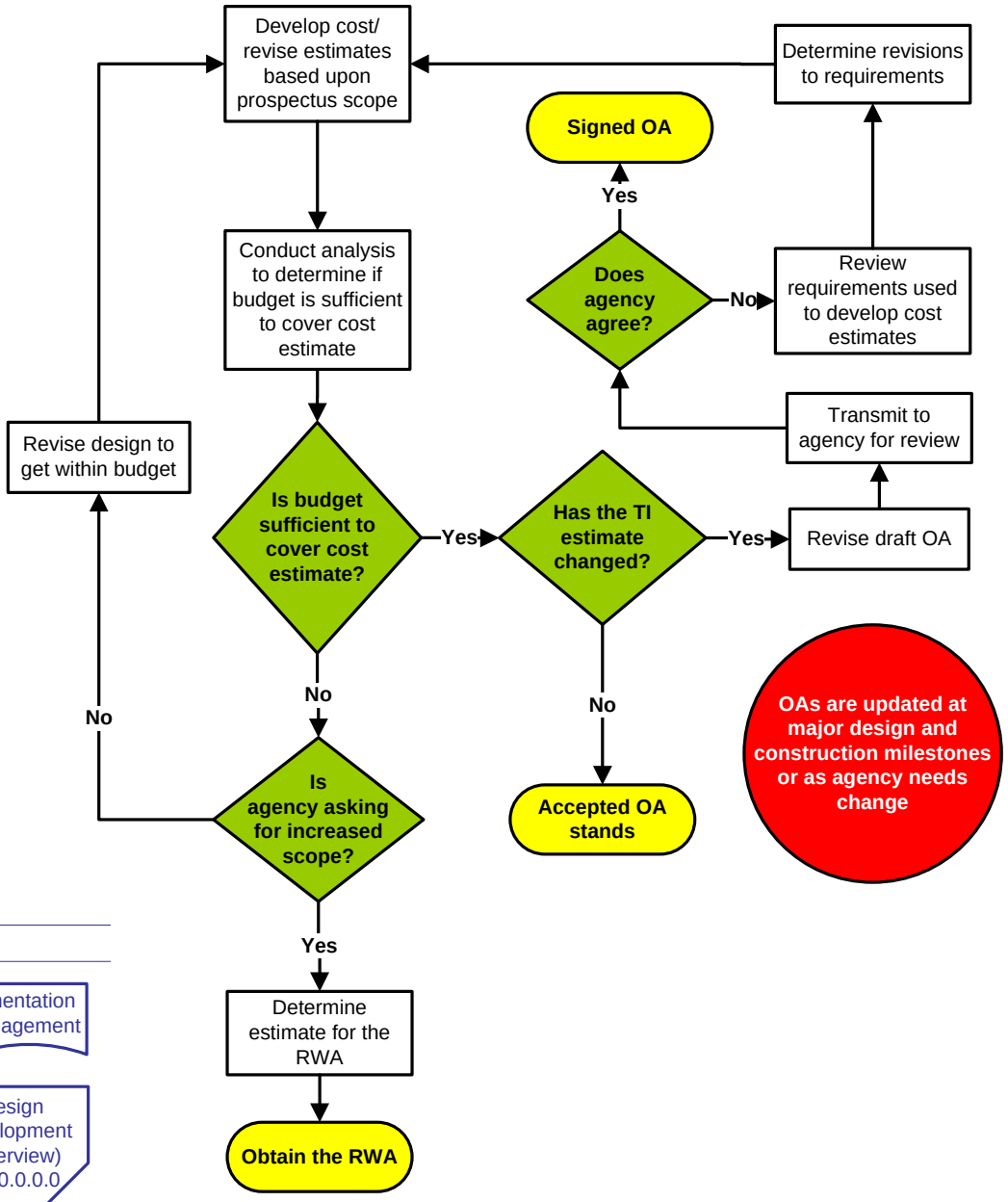
☑ Traditional ☐ D/B ☑ D/B-Bridging ☑ CMc

Construction Authorization (Prospectus) 3.4.0.0.0.0

OAs and RENT (Overview) 8.1.0.0.0.0

8.0.0.0.0.0 Tenant Occupancy
Traditional
8.1.1.4.0.0 Concept Design
8.1.1.4.1.0 Design Development
8.1.1.4.2.0 Mid-Point Construction Documents
8.1.1.4.3.0 100% Construction Documents

1.0.0.0.0.0 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
8.1.1.4.0.0 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



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 | 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

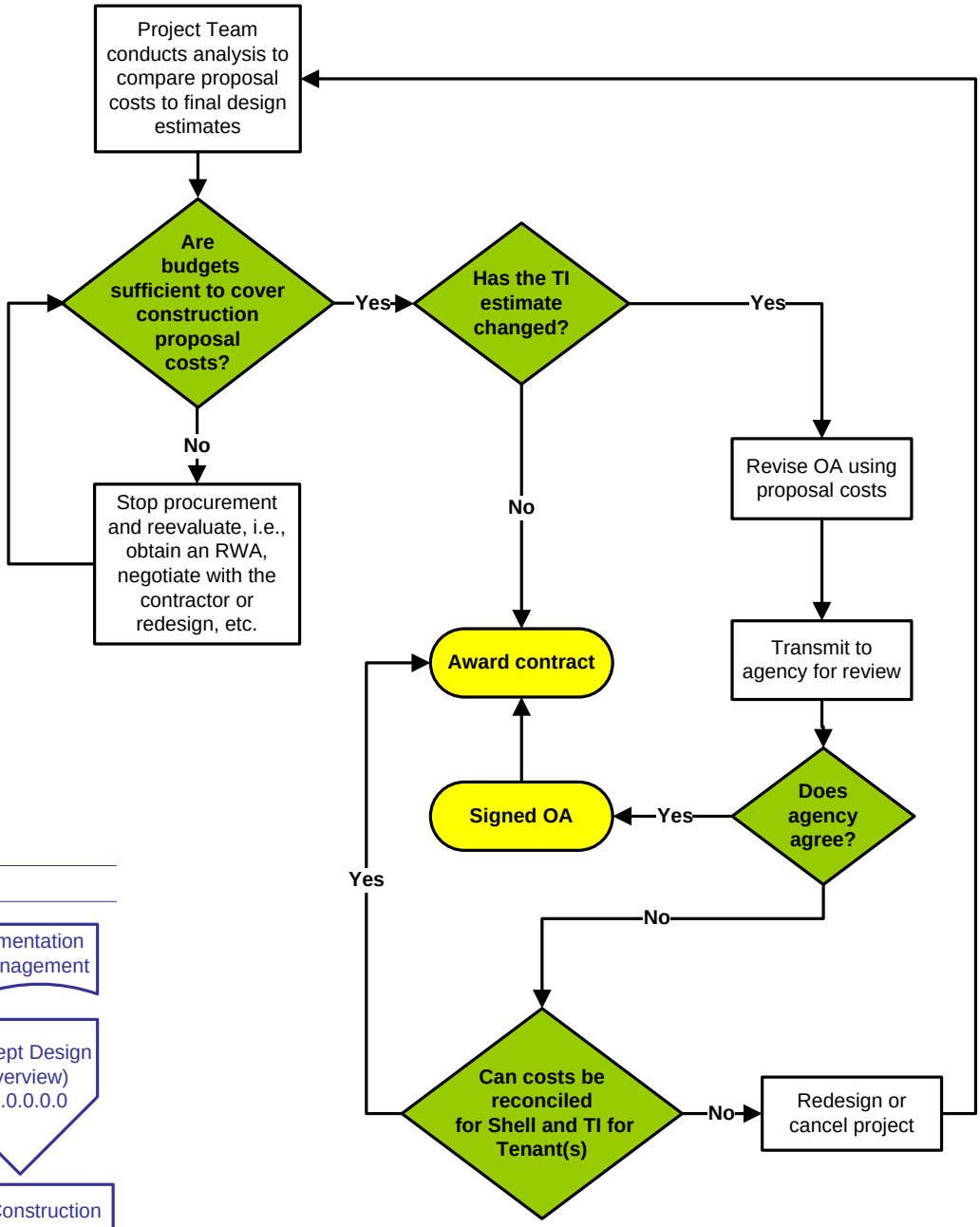
This page applies to:

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

OAs and RENT (Overview) 8.1.0.0.0.0

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

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



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:

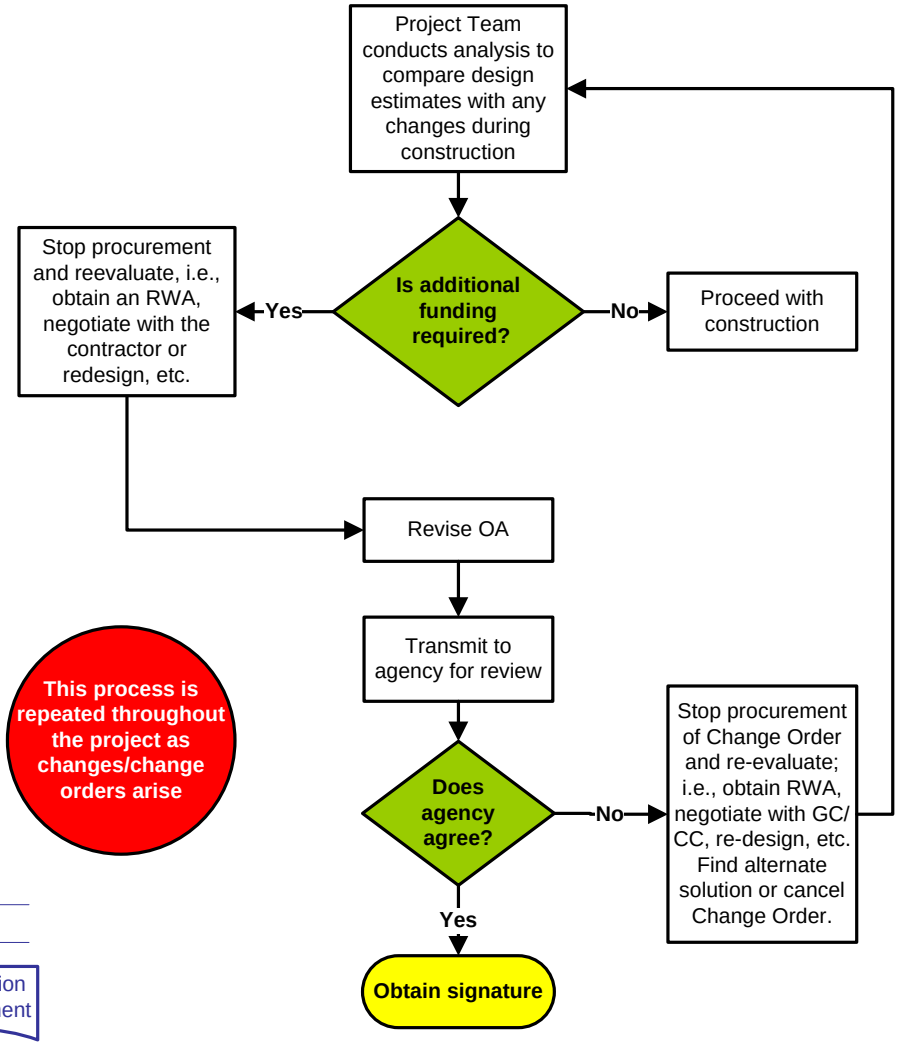
☑ Traditional ☐ D/B ☑ D/B-Bridging ☑ CMc

OA (Accepted Draft): During Construction 8.1.1.3.1.0

8.1.1.3.1.0 Occupancy Agreement (Accepted Draft): During Construction

OA (Accepted Draft): Before Construction Award 8.1.1.2.2.0.b

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
8.1.1.3.1.0 Occupancy Agreement (Accepted Draft): During Construction



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:

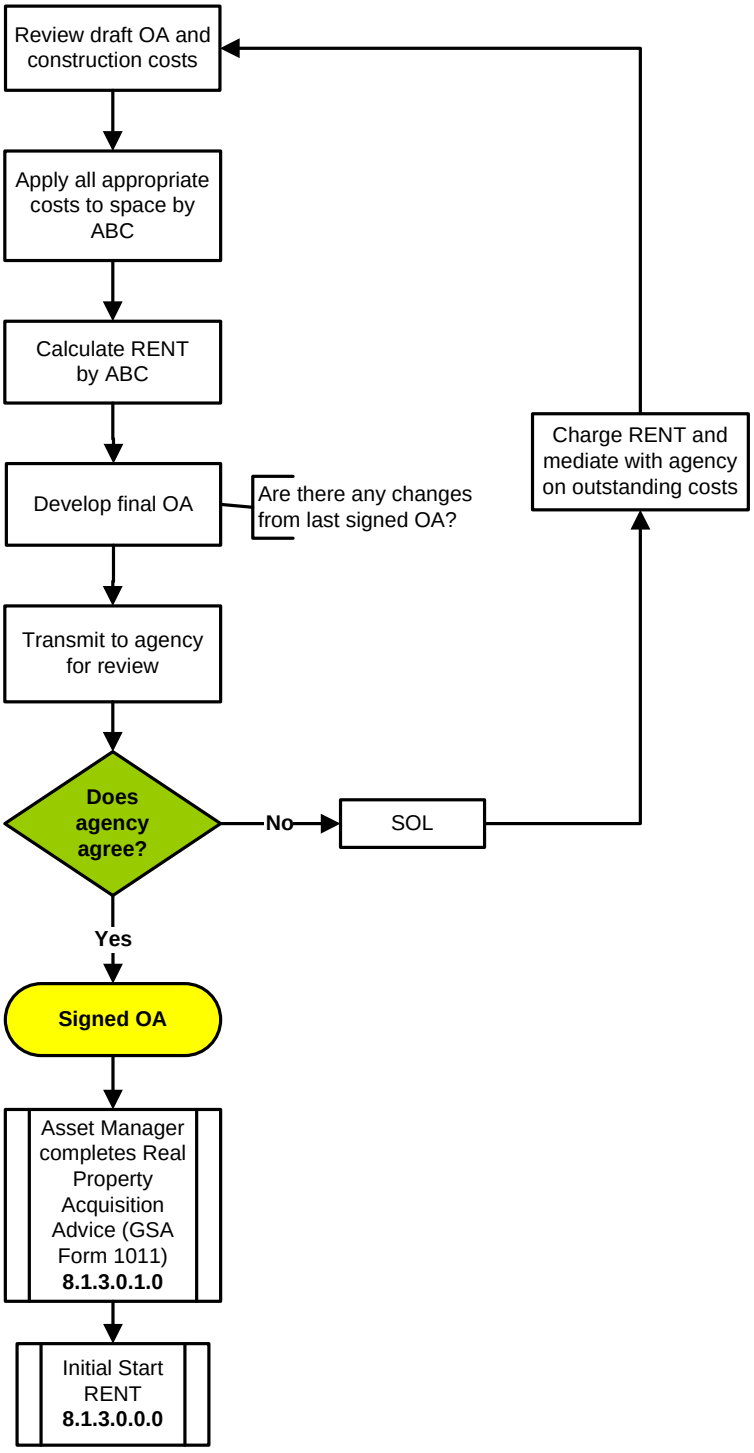
☑ Traditional ☑ D/B ☑ D/B-Bridging ☑ CMc

OAs and RENT (Overview) 8.1.0.0.0.0

8.0.0.0.0.0 Tenant Occupancy
Traditional
8.1.1.5.0.1 Final Occupancy Agreement

OA (Accepted Draft): During Construction 8.1.1.3.1.0

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



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) 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

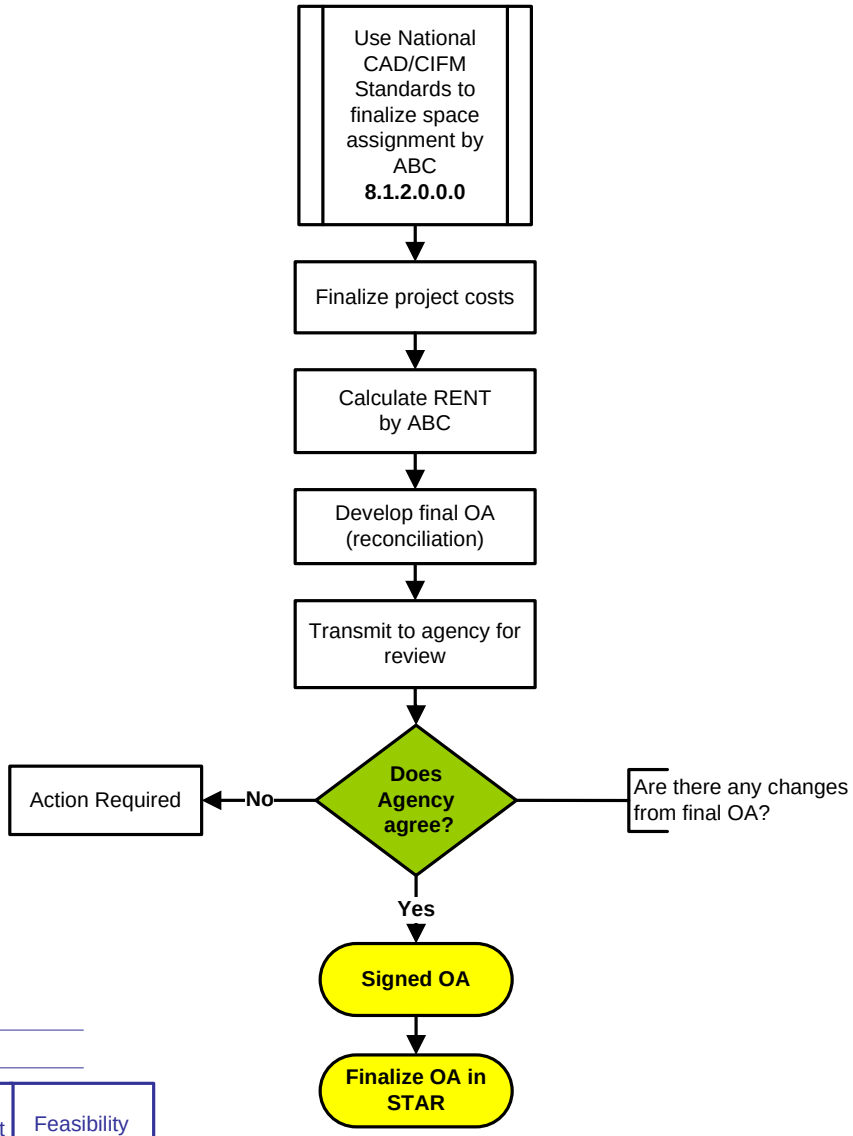
This page applies to:

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

Final OA (Reconciliation) 8.1.1.5.0.0

8.0.0.0.0.0 Tenant Occupancy
Traditional
8.1.1.5.0.0 Final Occupancy Agreement (Reconciliation)

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
8.1.1.5.0.0 Final Occupancy Agreement (Reconciliation)



LINKS

PBS Pricing Desk Guide

Pricing Implementation for Project Management

Feasibility 2.4.1.0.0.0.a

PDS 2.5.0.0.0.0

Concept Design (Overview) 6.7.0.0.0.0

Design Development (Overview) 6.8.0.0.0.0

Construction Documents 6.9.0.0.0.0

GC/CC Source Selection Plan 6.10.1.0.0.0

(0% to 100% Construction) 7.1.0.0.0.0

OAs and RENT (Overview) 8.1.0.0.0.0

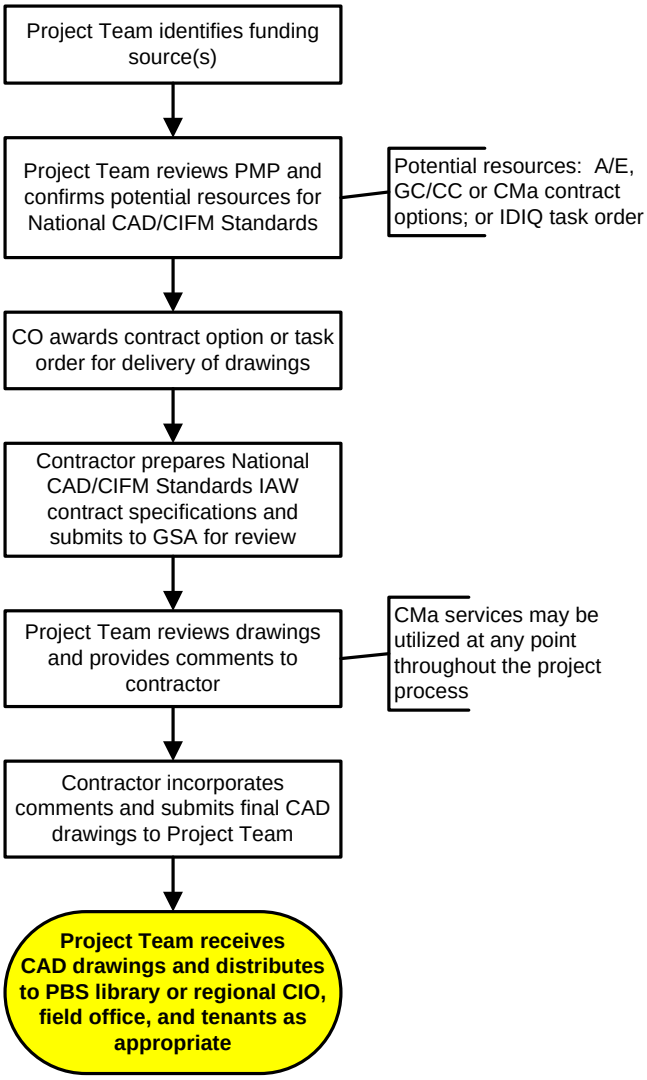
This page applies to:

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

Initial RENT Start 8.1.3.0.0.0

8.0.0.0.0.0 Tenant Occupancy
Traditional
8.1.2.0.0.0 National CAD/CIFM Standards

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
8.1.2.0.0.0 National CAD/ CIFM Standards



LINKS

BOMA Space Measurement Standards

National CAD/ CIFM Standards

PBS-P100

OAs and RENT (Overview) 8.1.0.0.0.0

This page applies to:

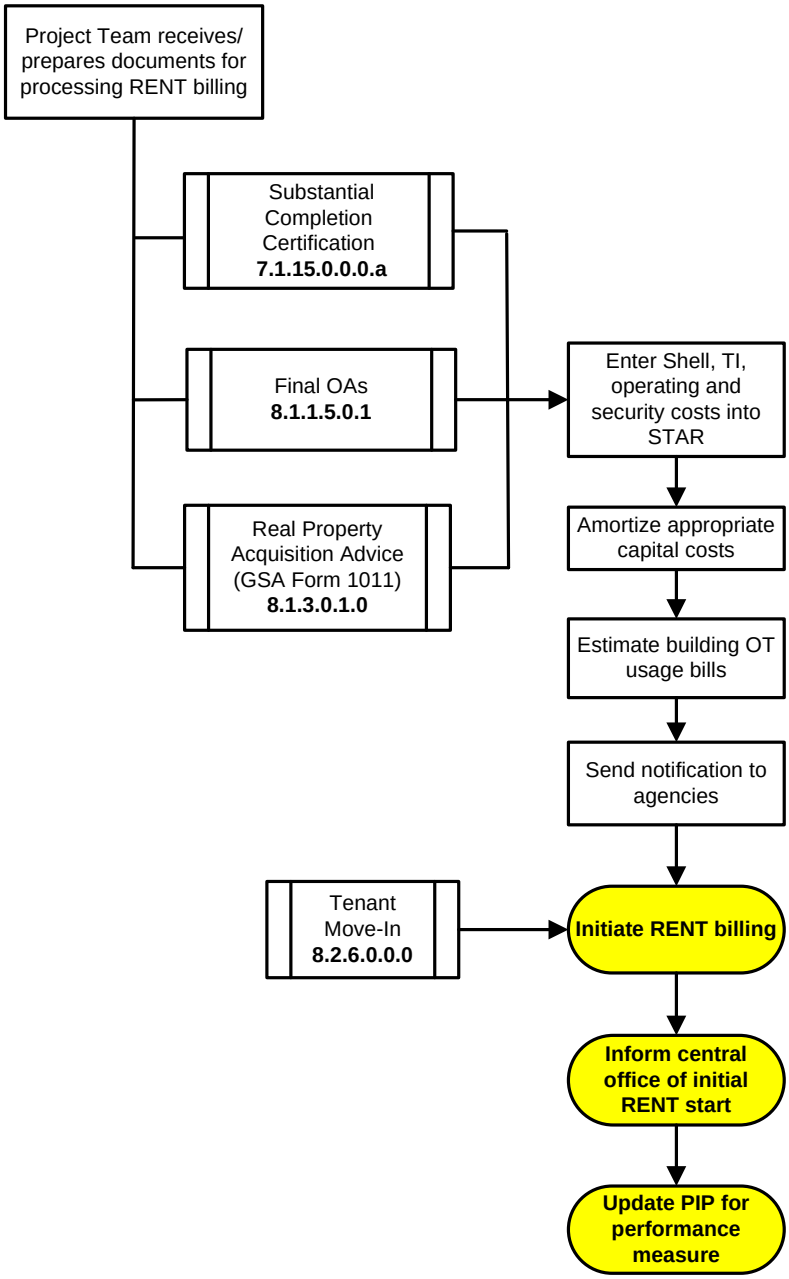
☑ Traditional ☑ D/B ☑ D/B-Bridging ☑ CMc

Final OA (Reconciliation) 8.1.1.5.0.0

Final OA
8.1.1.5.0.1

8.0.0.0.0.0 Tenant Occupancy
Traditional
8.1.3.0.0.0 Initial RENT Start

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
8.1.3.0.0.0 Initial RENT Start



LINKS

PBS Pricing Desk Guide | Pricing Implementation for Project Management

This page applies to:

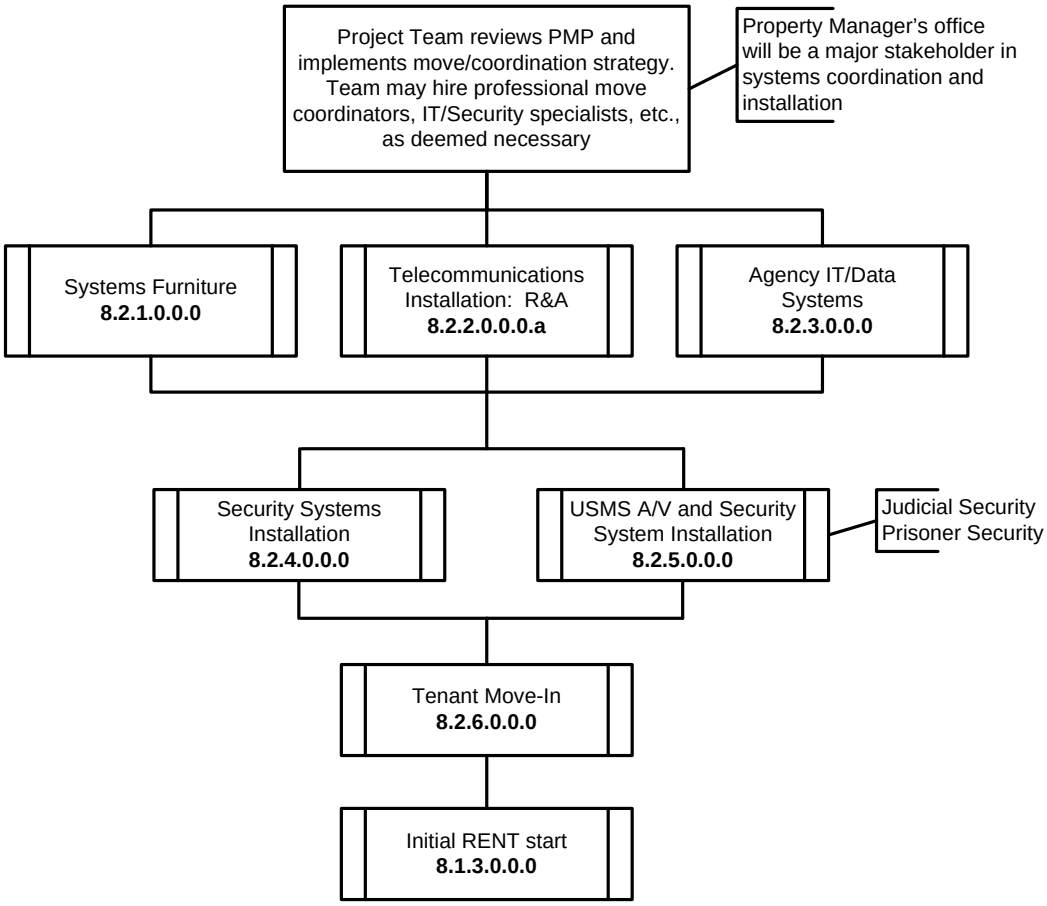
☑ Traditional ☑ D/B ☑ D/B-Bridging ☑ CMc

Final OA
(Reconciliation)
8.1.1.5.0.0

PMP
1.1.1.0.0.0.b

8.0.0.0.0.0.0 Tenant Occupancy
Traditional
8.2.0.0.0.0.0 Furniture, Fixtures, and Equipment (FFE)/Move-In (Overview)

1.0.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0.0 Planning
3.0.0.0.0.0.0 Authorization/ Funding
4.0.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0.0 Design/Build
6.0.0.0.0.0.0 Design
7.0.0.0.0.0.0 Construction
8.0.0.0.0.0.0 Tenant Occupancy
8.2.0.0.0.0.0 Furniture, Fixtures, and Equipment (FFE)/Move-In (Overview)



This page applies to:

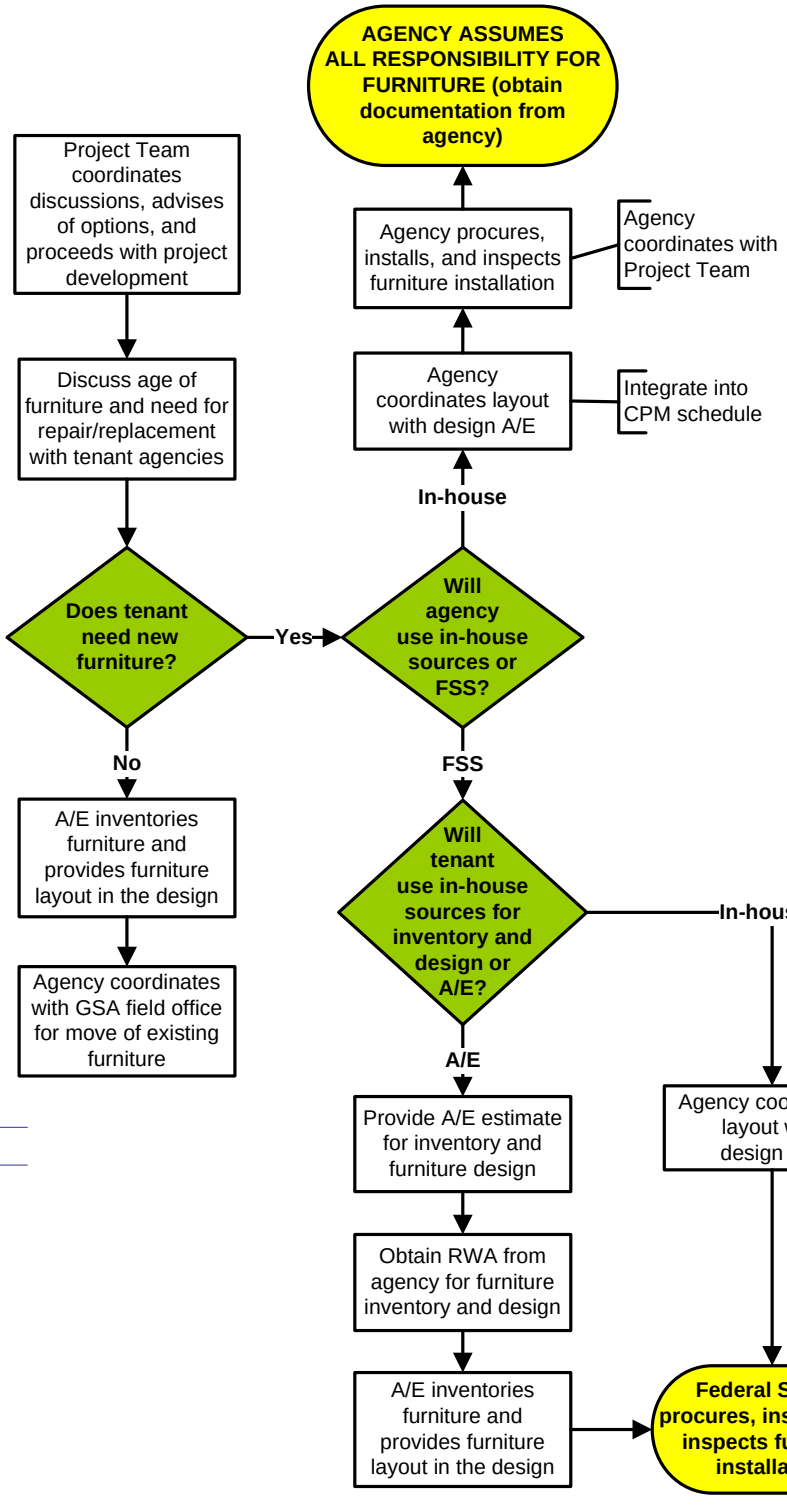
☑ Traditional ☑ D/B ☑ D/B-Bridging ☑ CMc

Systems Furniture
8.2.1.0.0.0

8.0.0.0.0.0 Tenant Occupancy
Traditional
8.2.1.0.0.0 Systems Furniture

Tenant Occupancy 8.0.0.0.0.0

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



LINKS

PDS 2.5.0.0.0.0

DD Submission (35%) 6.8.5.0.0.0

Additional Phases Delivery (IT, Phases, Annexes) 7.1.13.0.0.0

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

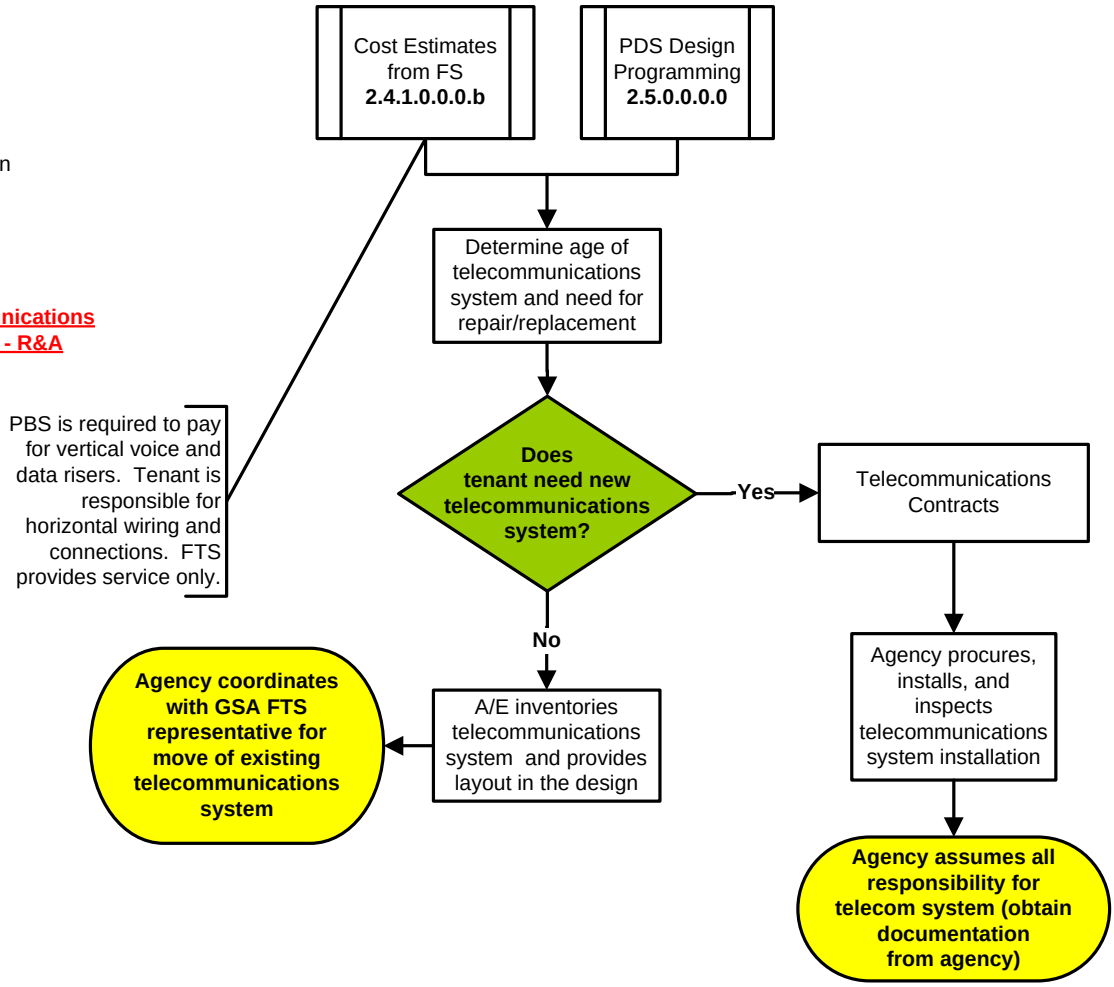
This page applies to:

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

Tenant Occupancy 8.0.0.0.0.0

8.0.0.0.0.0 Tenant Occupancy
Traditional
8.2.2.0.0.0.a Telecommunications Installation - R&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
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy
8.2.2.0.0.0.a Telecommunications Installation - R&A



LINKS

PDS 2.5.0.0.0.0

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

Agency IT Data Systems 8.2.3.0.0.0

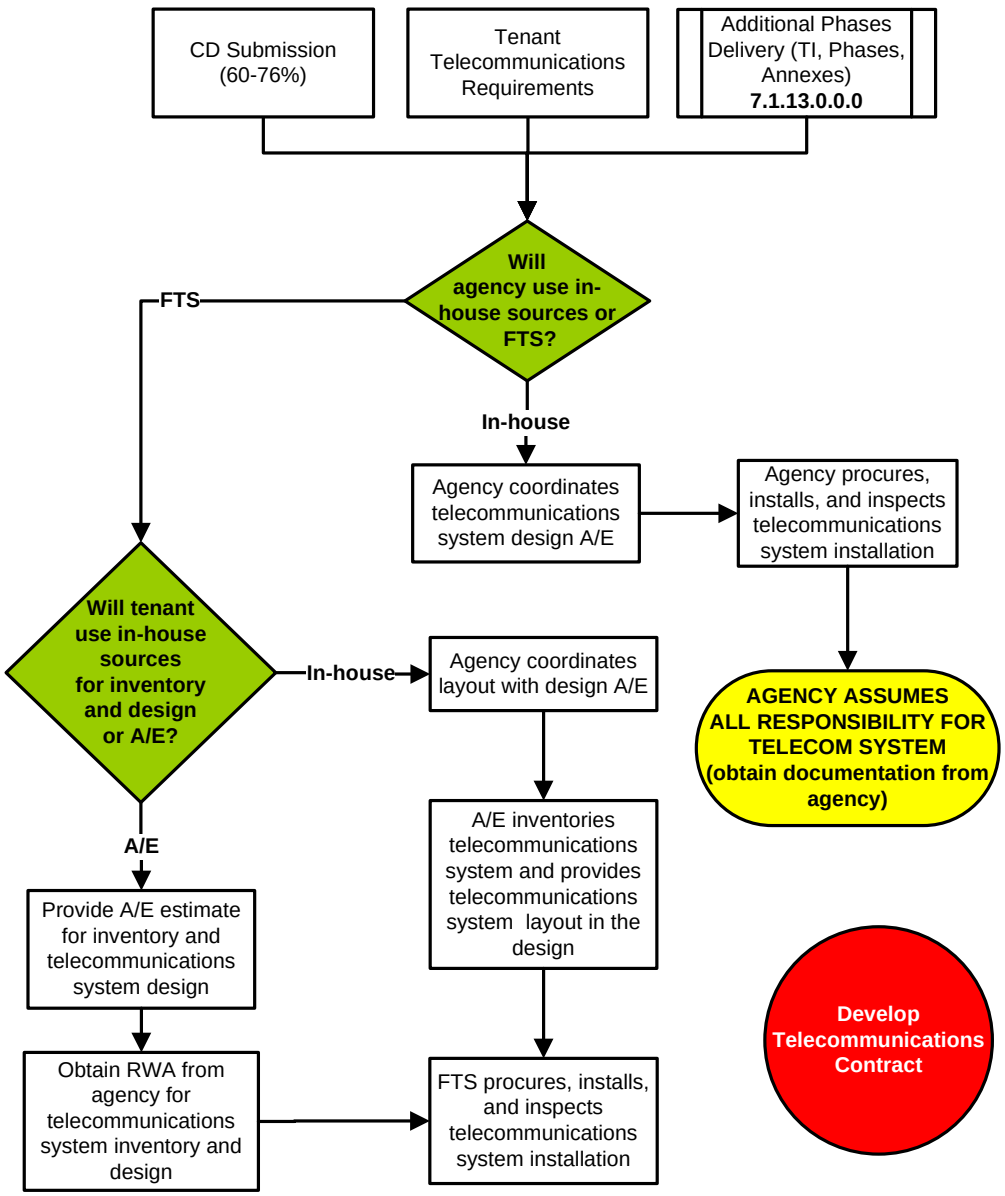
This page applies to:

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

Tenant Occupancy 8.0.0.0.0.0

8.0.0.0.0.0 Tenant Occupancy
Traditional
8.2.2.0.0.0.b Telecommunications Installation - New Construction

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
3.0.0.0.0.0 Authorization/ Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design/Build
6.0.0.0.0.0 Design
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy
8.2.2.0.0.0.b Telecommunications Installation - New Construction



LINKS

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

Agency IT Data Systems 8.2.3.0.0.0

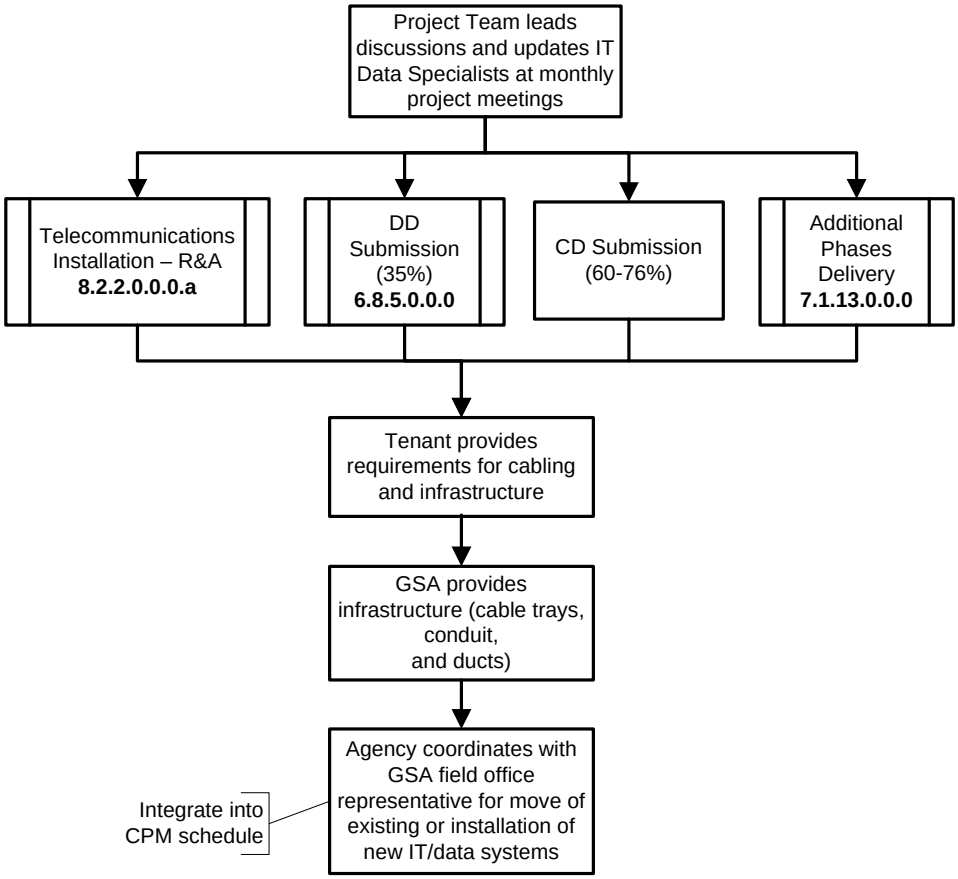
This page applies to:

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

Tenant Occupancy 8.0.0.0.0.0

8.0.0.0.0.0 Tenant Occupancy
Traditional
8.2.3.0.0.0 Agency IT/Data Systems

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
3.0.0.0.0.0 Authorization/ Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design/Build
6.0.0.0.0.0 Design
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy
8.2.3.0.0.0 Agency IT/Data Systems



LINKS

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

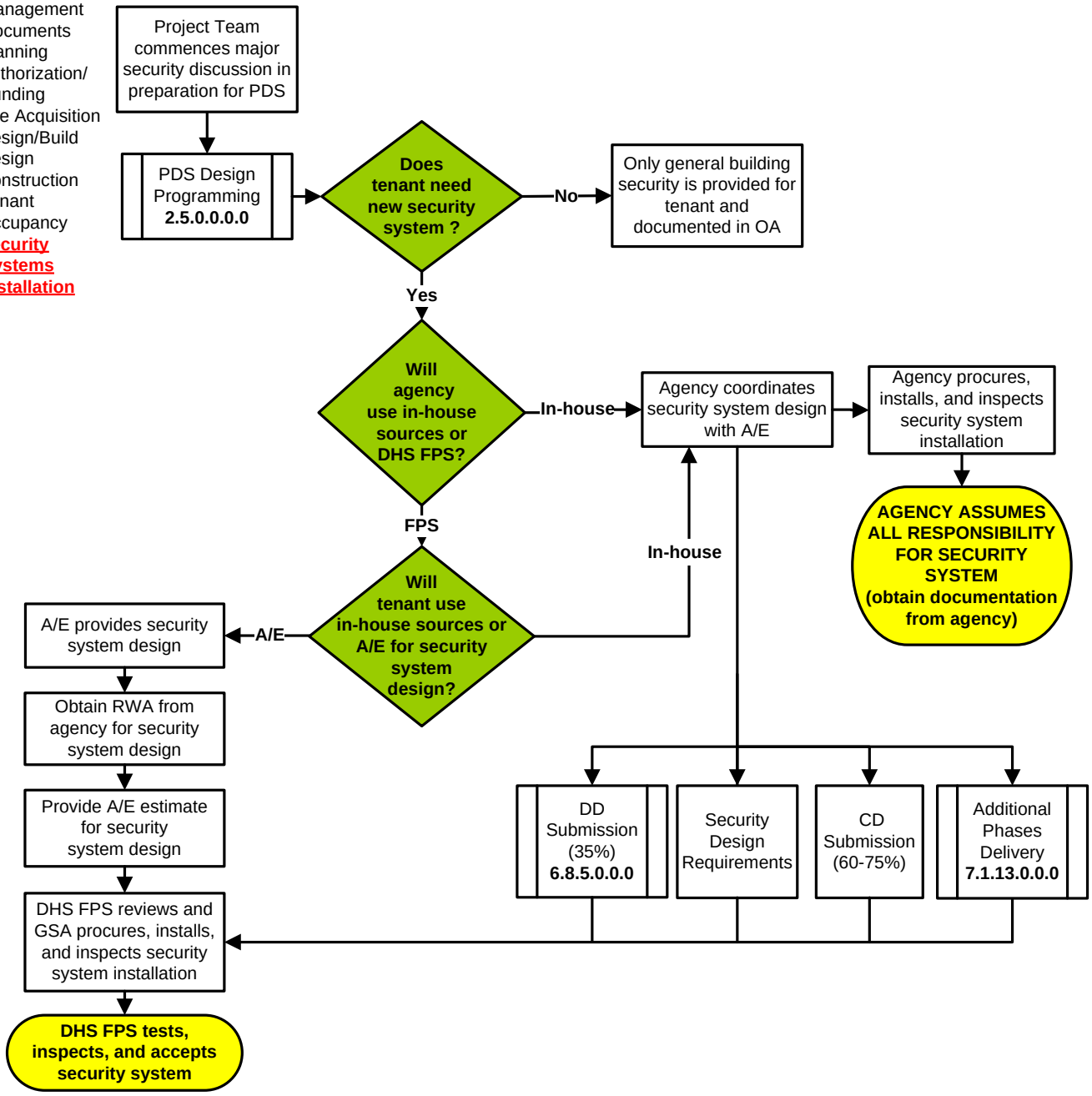
This page applies to:

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

Tenant Occupancy 8.0.0.0.0.0

8.0.0.0.0.0 Tenant Occupancy
Traditional
8.2.4.0.0.0 Security Systems Installation

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



LINKS

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

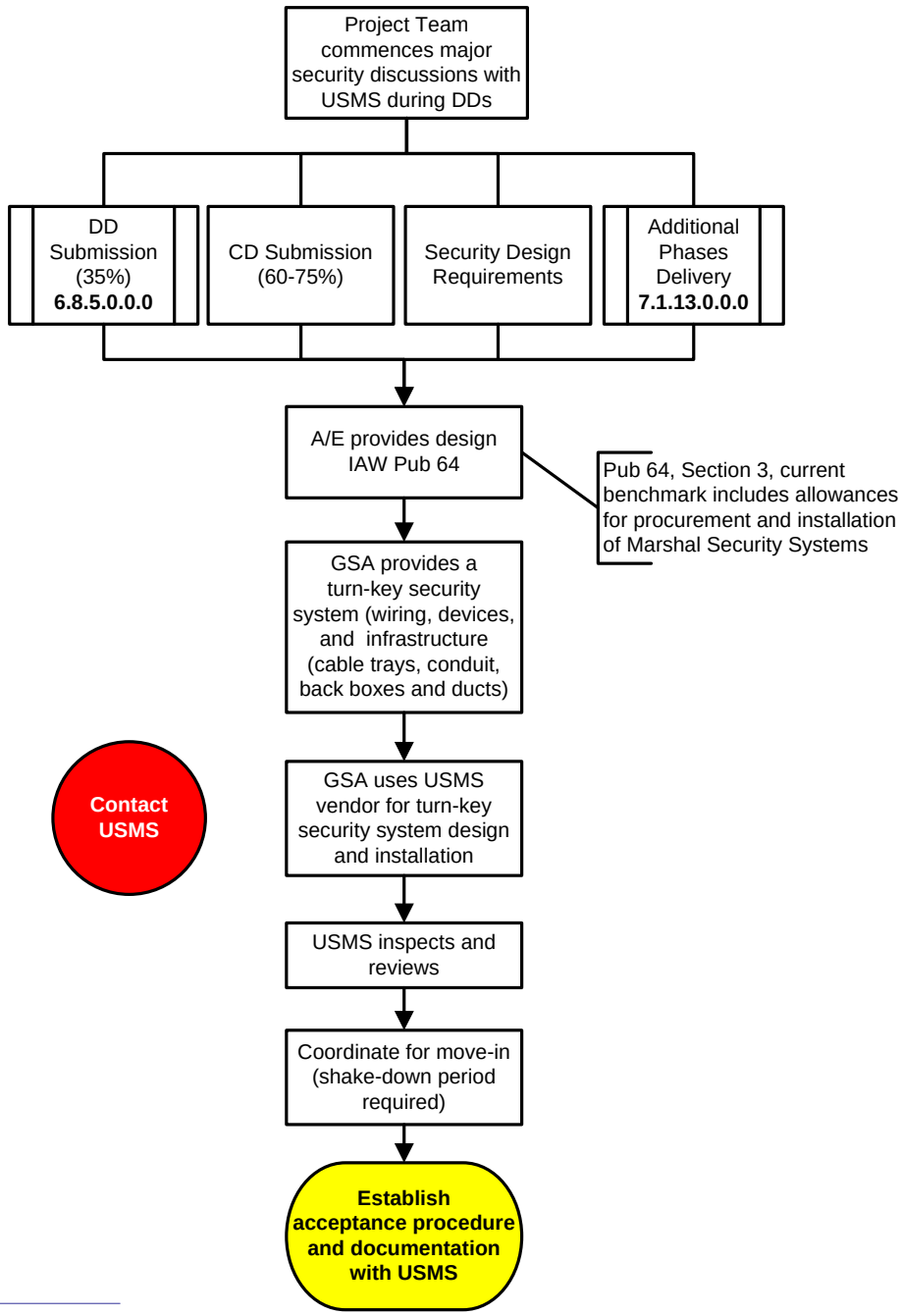
This page applies to:

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

Tenant Occupancy 8.0.0.0.0.0

8.0.0.0.0.0 Tenant Occupancy
Traditional
8.2.5.0.0.0 USMS A/V and Security Systems Installation

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
3.0.0.0.0.0 Authorization/ Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design/Build
6.0.0.0.0.0 Design
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy
8.2.5.0.0.0 USMS A/V and Security Systems Installation



LINKS

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

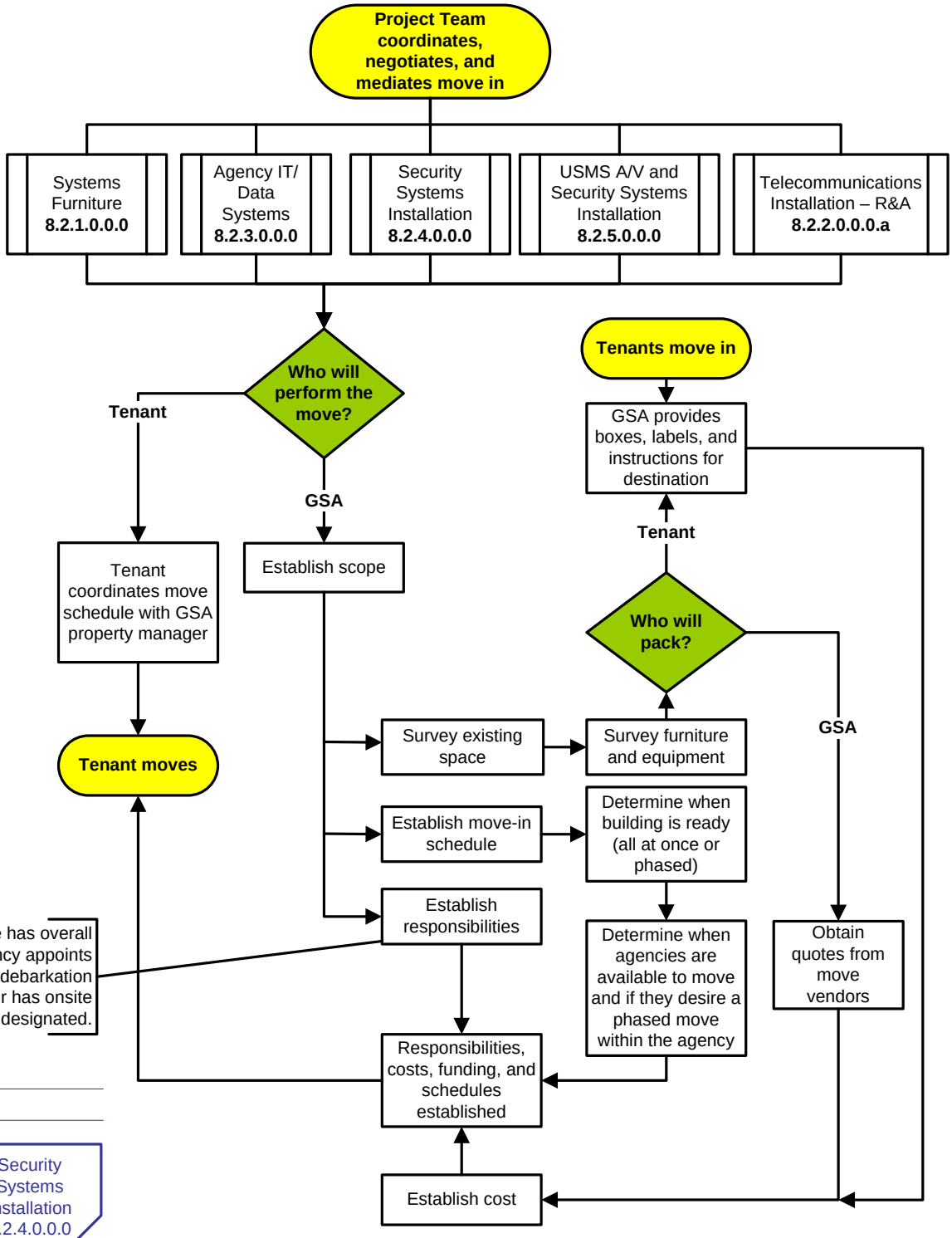
This page applies to:

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

Tenant Occupancy 8.0.0.0.0.0

8.0.0.0.0.0 Tenant Occupancy
Traditional
8.2.6.0.0.0 Tenant Move-In

1.0.0.0.0.0 Project Management Documents
2.0.0.0.0.0 Planning
3.0.0.0.0.0 Authorization/ Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0.0 Design/Build
6.0.0.0.0.0 Design
7.0.0.0.0.0 Construction
8.0.0.0.0.0 Tenant Occupancy
8.2.6.0.0.0 Tenant Move-In



LINKS

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

Initial RENT Start 8.1.3.0.0.0