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Public Buildings Service

# FBI/GSA Industry Day



June 19, 2007

# Overview

**J. David Hood**  
Assistant Regional Administrator  
Great Lakes Region, PBS



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# Overview

- Significance
- Nationwide Interagency Collaboration
- Forging Business Alliances
- Evolution & Improvement
- Project Life Cycle-based Agenda



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# Project Life-Cycle Overview

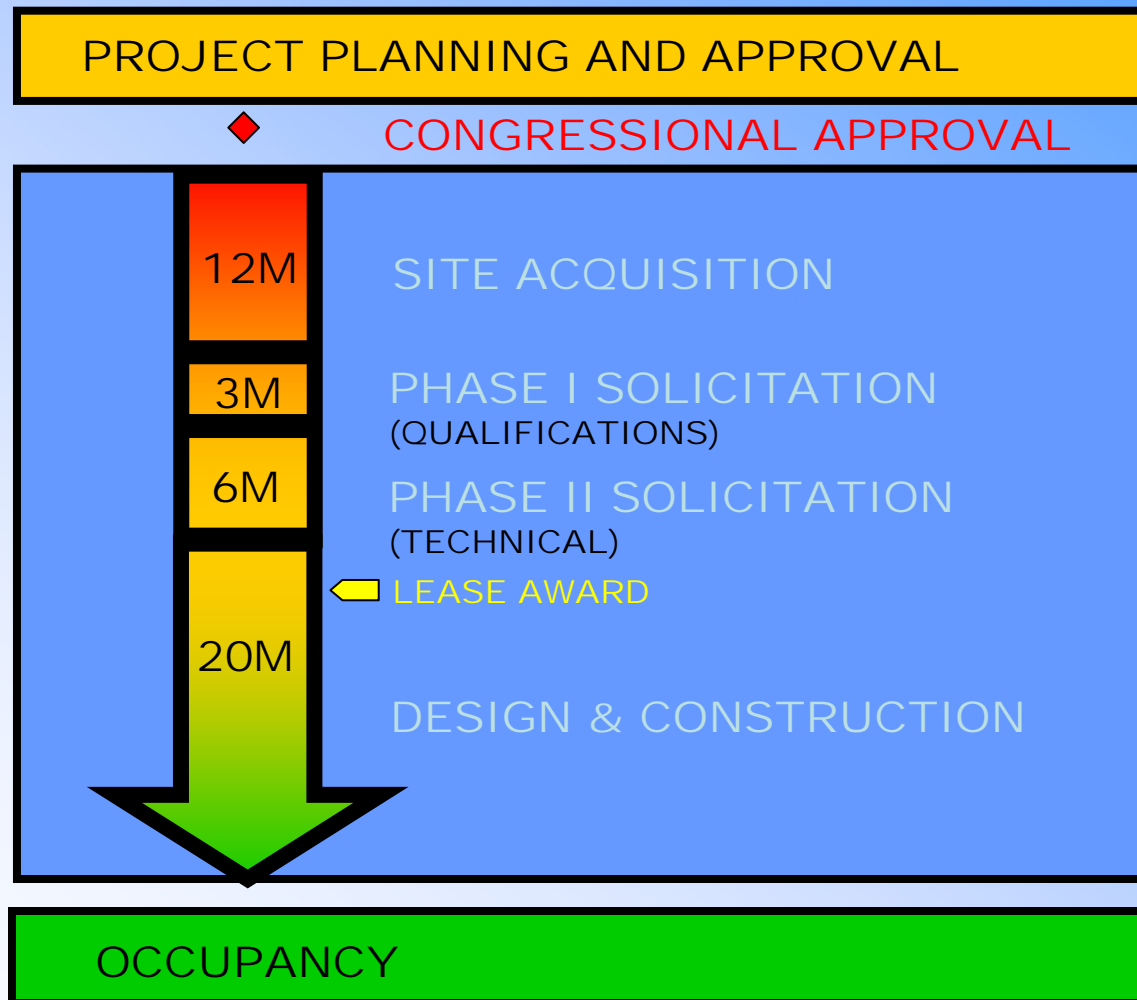
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Assistant Regional Administrator  
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# Project Life-Cycle Overview



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# Congressional Approval

- Public Buildings Act Prospectus Requirements
- OMB Review
- Site Selection Authorized Upon Prospectus Submission to Congress
- Prospectus Approval
  - Both House & Senate
  - Committee level only
- Operating, not Capital Leases



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# Post-Award

- Exercise of Site Option
- Design Development
- Construction
- Occupancy
- Ongoing Operation & Management
- Future Government-purchase Option

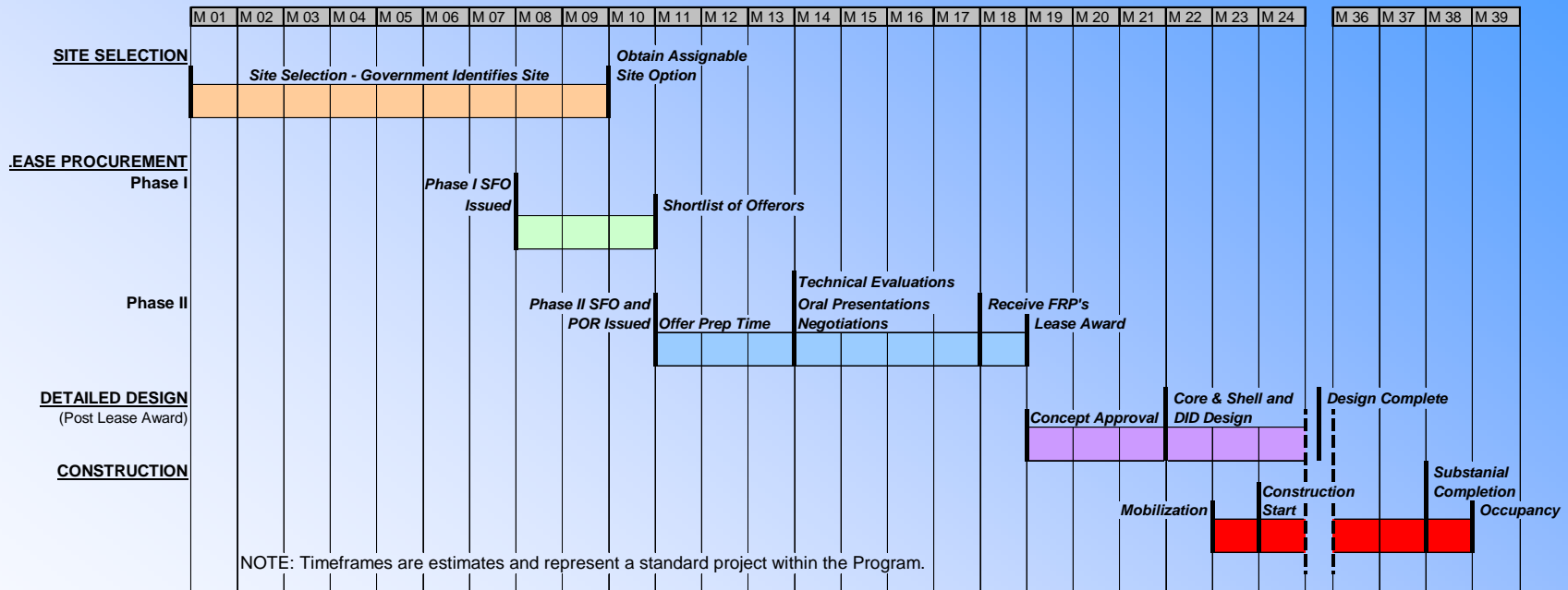


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# Schedule

FBI Lease Construction Program - Project Life Cycle



NOTE: Timeframes are estimates and represent a standard project within the Program.

- SITE SELECTION**
- Market Survey
  - Advertise for Site
  - Review Sites
  - Site Analysis
  - NEPA Review
  - Site Selection
  - Negotiate Site Option
  - Obtain Assignable Site Option

- LEASE PROCUREMENT**
- Phase I
- SFO Development
  - Advertise
  - SFO - Phase I Issued
  - Receive Offers
  - Source Selection Eval.
  - Shortlist of Offerors

- LEASE PROCUREMENT**
- Phase II
- Prepare Phase II SFO & POR
  - SFO - Phase II & POR Issued
  - Concept Development by Offerors
  - Concept Vision Presentation
  - Evaluation of Offers
  - Negotiations
  - Receive BAFO's
  - Reevaluate/Recommendations
  - Lease Award

- DETAILED DESIGN**
- (Post Award)
- Concept Refinement
  - Concept Approval
  - Design Development
  - Core & Shell Design Complete
  - Space Planning
  - Full Design Complete

- CONSTRUCTION**
- Mobilization
  - Fast Track Construction Start
  - Construction
  - Substantial Completion
  - Move In
  - Occupancy



# Procurement Process: *Phase I & II*

Nan Wauchop  
Regional Realty Services Officer  
Great Lakes Region, PBS



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# Two Phase Process

- Best Value Trade-Off
  - Technical factors, more important than price
  - Phase I – Team Qualifications
  - Phase II – Conceptual Design and Price



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# Purpose of Phase I

- Methodology of Evaluation Process
  - Provides advancement of qualified teams
  - Short list 3 to 5 firms
- Selection Criteria
  - Technical Factors - Team Qualifications
  - No Price Proposals



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# Phase I Technical Factors

- Development Team & Key Personnel Experience
- Development Team's Past Performance
- Design Approach
- Multiple Project Management Plan



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# Development Team & Key Personnel Experience

- Collaborative Team Effort
- Similar complex projects
- Team Member's Experience
- Design Build Experience



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# Development Team's Past Performance

- Successful team efforts in management of similar projects
- Federal National Contractor Performance System (CPS)
- Future selections for all GSA projects



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# Design Approach Narrative

- Overall philosophy and approach to the specific project
  - Design management
  - Important elements of Design
    - Aesthetic Approach
    - Security
    - Sustainability
    - Budget Limitations
  - Lead Designer's level of involvement



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# Multiple-Award Project Management Plan

- Workload impact
- Time Commitment of Key Team Members
- No key personnel substitutions, without approval



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# Phase I Submittals

- Initial & Return SFO
- Sample Projects
- Team Member Experience
  - Principle in Charge for Developer
  - Project Manager for Developer
  - Lead Designer
  - Project Manager for General Contractor
- Time Commitment of Key Team Members

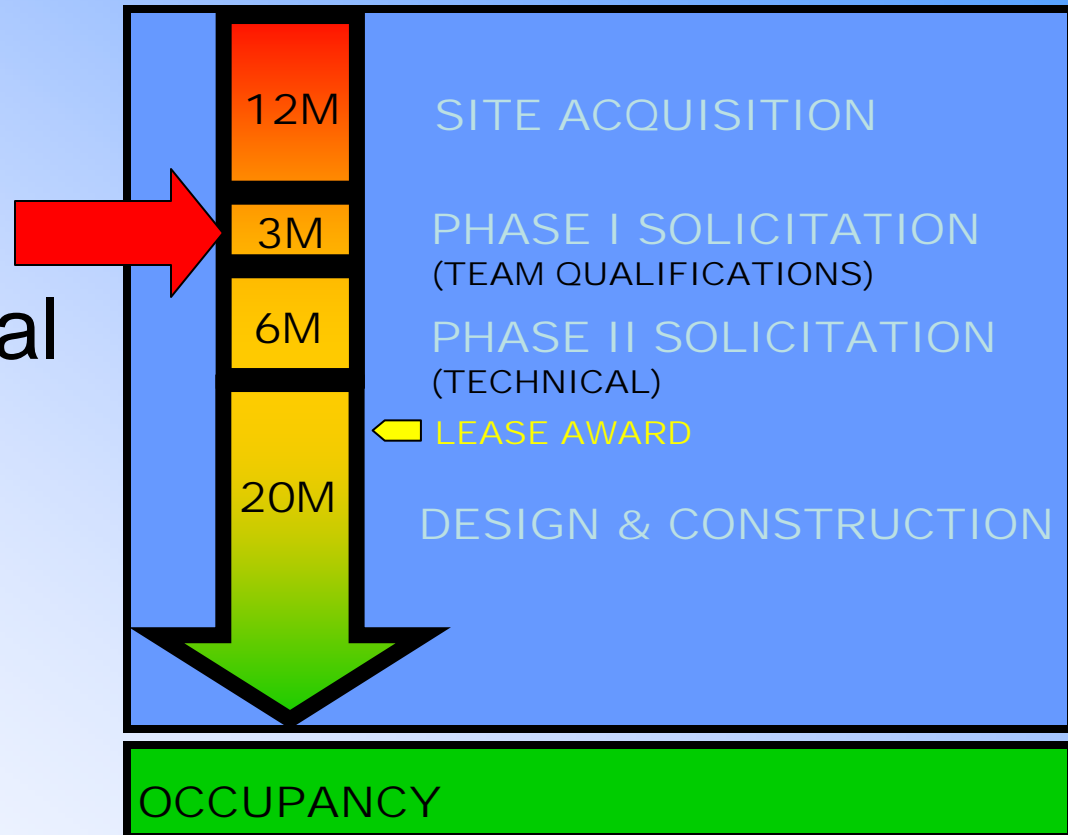


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# Phase I Timeframes

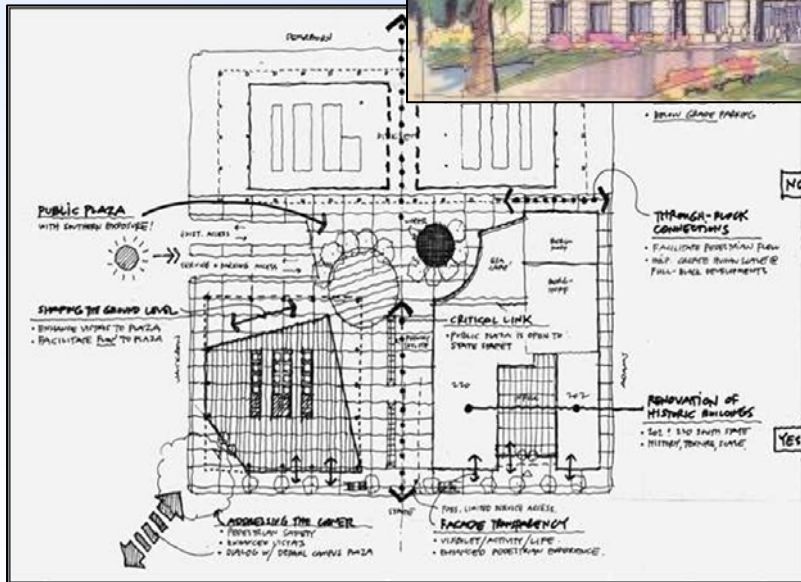
- Proposal Preparation
- Submit Proposal
- Government Evaluations
- Short List



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# Phase II

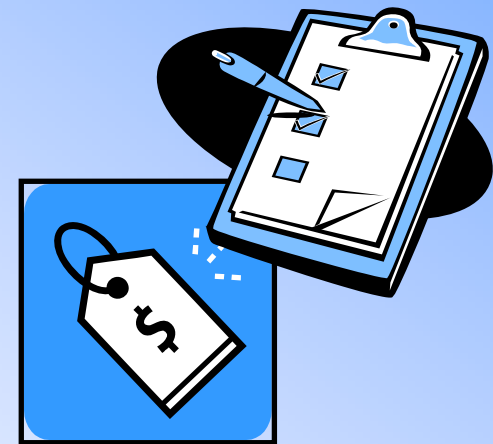


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# Purpose of Phase II

- Methodology of Evaluation Process
  - Evaluate Merits of Design Concepts
  - Ensure achievement of minimum requirements
  - Contracting Officer's price evaluation
  - Determination of Best Value
- Selection Criteria
  - Weighted Technical Factors, *and*
  - Price Submittals



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# Phase II Technical Factors

- Phase Two Technical Factors:
  1. Facility Design
  2. Site Layout & Design
  3. Building Systems



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# Facility Design

- Best overall value to the Government
- Optimize the balance between competing Design Goals
- FBI Projects have multiple design drivers:
  - Function & Program
  - Spatial Organization
  - Workplace Environment
  - Technology
  - Materials
  - Sustainability
  - Security
  - Engineering
  - Architectural Expression
  - Aesthetics
- Full Comprehensive Approach to Design



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# Integrated Performance Initiatives

- **Sustainability**  
(Environmental Design-Being “Green”)
- **Workplace Productivity**  
(Space Equity, Comfort, Flexibility, Day lighting, Sense of Place, etc.)
- **Security**  
(Levels of Threat: Blast, Small Arms, Air-Born, Theft/Assault)
- **Historic Preservation**  
(Historic Districts, Building Element Preservation/Restoration)



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# Integrated Performance Initiatives

- **Fire Safety**  
(Load Mgt., Detection/Alarms, Egress, Suppression)
- **Reduced Operations**  
(Accessible Equipment, Flexibility, Materials Compatibility, Durability)
- **Process Operations**  
(Occupancy Specific Functional Capabilities)
- **Design Excellence**  
(Aligned with “Guiding Principles of Federal Architecture”)



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# Workplace Productivity

- GSA Workplace 2020 Program
  - Pilot Programs completed in three GSA Regional Offices
- FBI projects have multiple goals
  - Support **Collaboration**
  - Enhance **Communication**
  - Improve **Effectiveness** & **Efficiency**
  - Enable Greater **Flexibility**
- Improve Productivity

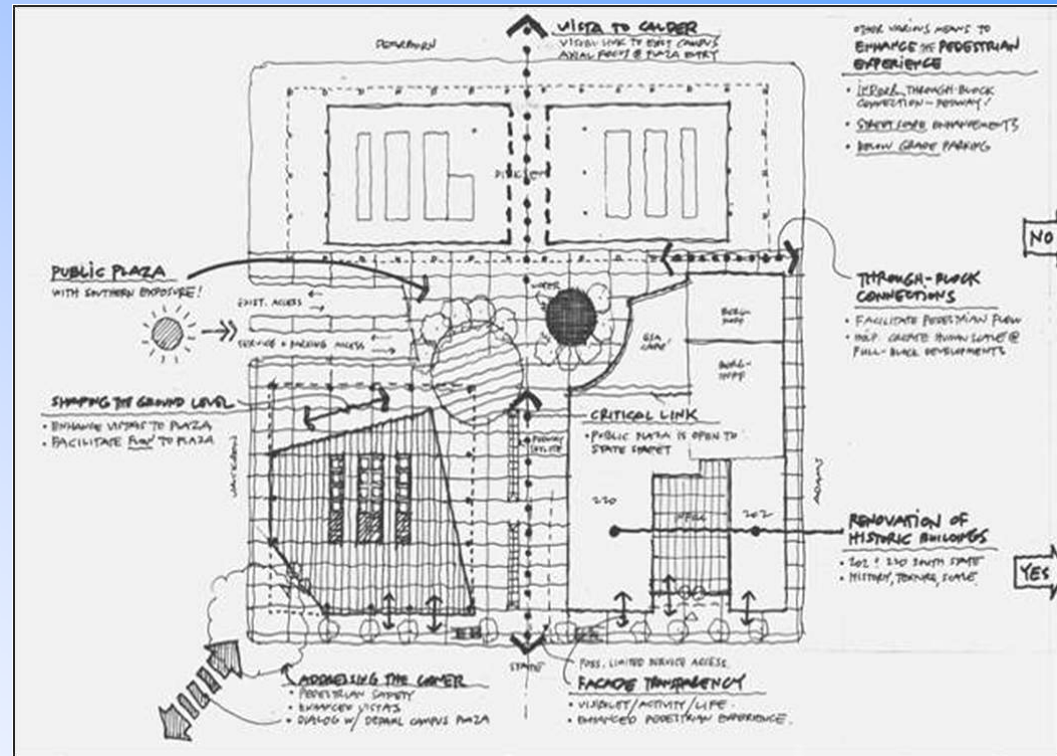


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# Site Layout & Design

- Functionality between Building Design and Site Layout.
- Site Security factors.
- Best use of Site



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# Building Systems

- Evaluation of Selected Systems
  - HVAC
  - Power
  - Security

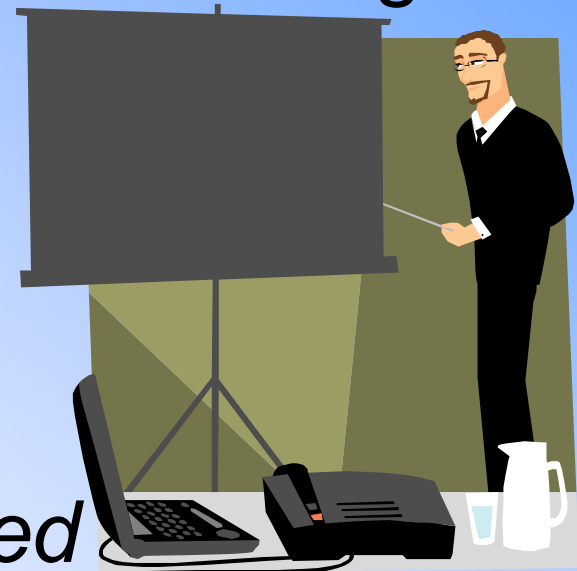


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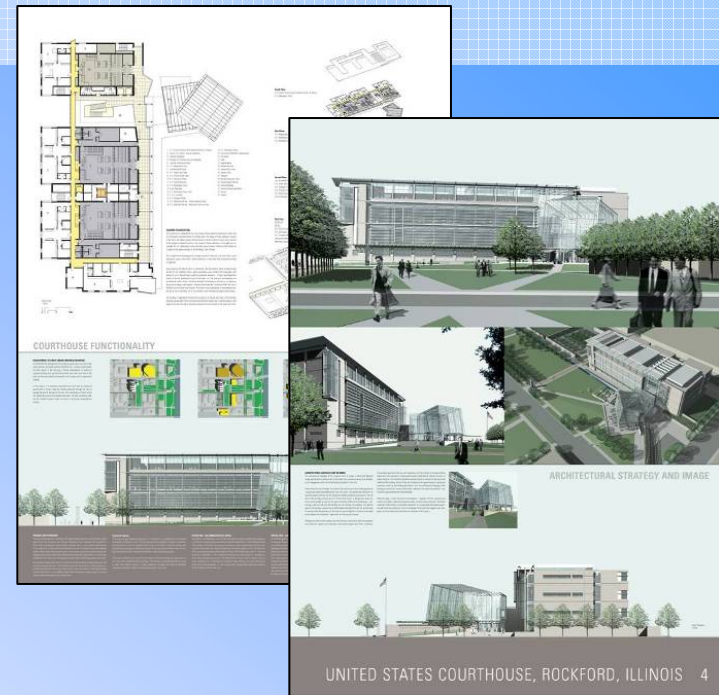
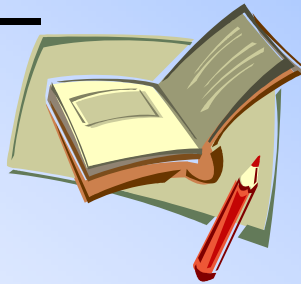
# Oral Presentation

- Emphasis on Conceptual Design
  - Reinforces the Phase II Technical Submission
- Enhance Government's Understanding of the Proposal
- Typically 2 hours
- All "Key Personnel" Should be Present
- Presentation is Not Evaluated



# Phase II Submittals

- Design Narrative & Concept Drawings
- Phase II SFO – Minimum Requirements
- Pricing Proposal and Other Required Submittal Items



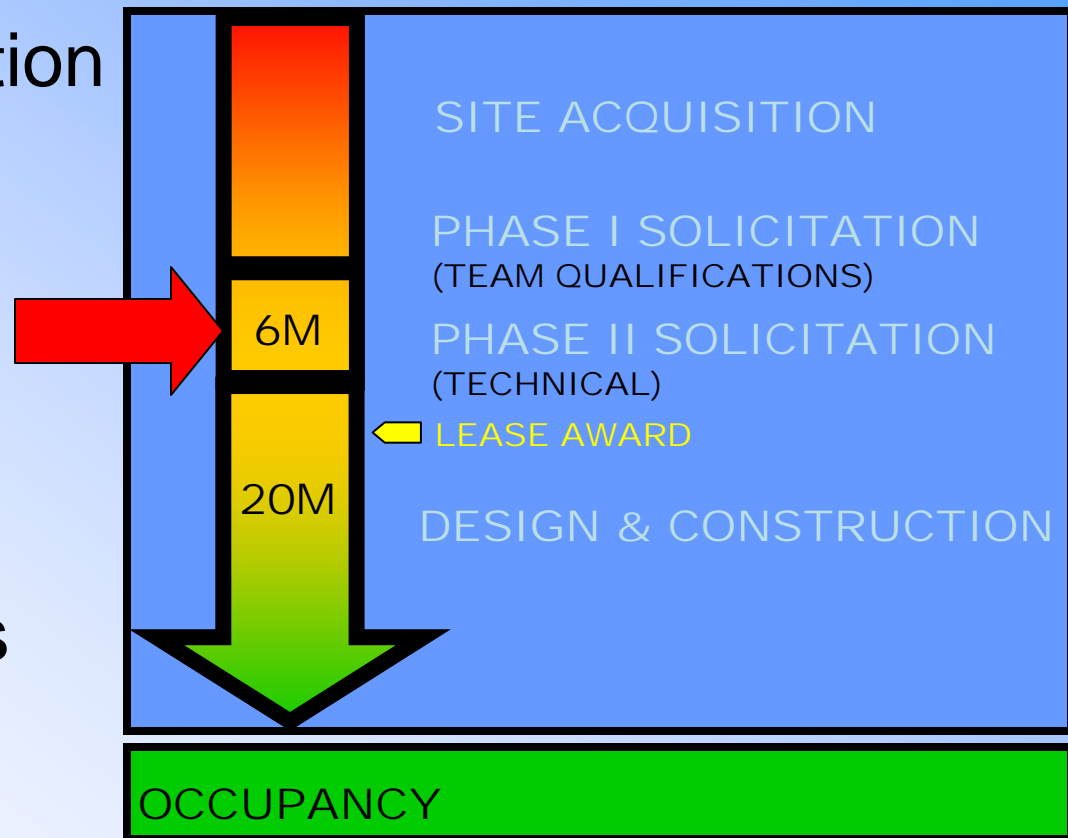
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# Phase II Timeframes

- Proposal Preparation
- Submit Proposal
- Government Evaluations
- Oral Presentation
- Team Consensus
- Price Negotiations
- Award



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# Lease Award

**Latrice Lacy**  
Contracting Officer  
Great Lakes Region, PBS

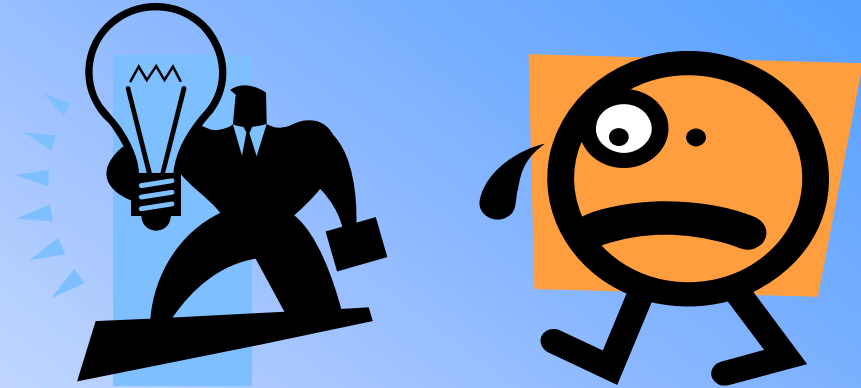


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# Discussions / Negotiations

- Design Concept
  - Strengths
  - Weaknesses
  - Deficiencies
- Price Proposal
  - Signatory Authority
  - Financial Responsibility
  - Fair and Reasonable
  - Responsiveness



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# Discussions / Negotiations Limited Time Frame

- Design Concept
  - One formal discussion round
  - Goal to correct POST-AWARD
- Pricing Proposal
  - Initial evaluation
  - Other submittals and evaluations as required
- Request for Final Revised Proposal
  - Design Concept Deficiencies
  - Pricing



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# Price Evaluation

## Government Focus

- No Numerical score or rating
- Non-weighted Consideration
- Independent Government Estimate

## Offeror Focus

- Fully understand scope
- Reasonably identify costs



# Price Evaluation

- Present Value Analysis
  - ANSI/BOMA Basis
  - Adjustment made to Offered Prices
- Operating Lease
  - Limited to 90% of fair market value



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# Responsibility Verification

- Evidence of Capability to Perform
  - Conditional commitment of funds
  - Architectural and Engineering License Verification
  - Zoning Compliance, if applicable



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# Best Value Tradeoffs

- Fully Responsive Offer
- Weighted Technical Factors
- Price Significantly Less Important
- Highest Technical Score Typically Represents Best Value



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# Security Clearance Process

## FBI

- Final Revised Proposal Requirement
- Sealed Envelope
- Two Levels
  - Limited Clearance
  - Secret Clearance
- Electronic Process

## GSA

- Federal Building Access
  - Move/Relocation
- HSPD-12



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# Designated Site Option

- Option Terms Vary
- Provided Pre-Award
  - Submit Comments
- Transfer Site as part of the Lease Contract
  - Represents Unconditional Acceptance of Option Terms
- Fee Simple Interest in Real Property



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# Post-Award Design Development

**Robert Theel**  
Regional Chief Architect  
Great Lakes Region, PBS



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# Post-Award Design Development



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# Post-Award Design Development

- Continual Improvement of Process:  
*Developer Teams have asked for...*
  - ...less pre-award “guessing” on comments.
  - ...minimal pre-award concept redesign.
  - ...less time and money in pre-award effort.
  - ...more direct interaction with GSA & FBI to finalize concept and address weaknesses.



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# Process Improvements for 2007

- One pre-award response to weaknesses (written response).
- Post-award refinement of concept within budget.
  - Design Reviews
  - Trade-offs Process
  - Final Concept Approval
- Design Excellence Peer Review, Post-award.



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# Impact of Process Improvements

- Less pre-award review and revision with multiple offerors.
- More post-award review and concept revision with selected offeror.
- Direct dialogue between selected offeror and GSA/FBI.



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# Post-Award Design Milestones

- Award
- Concept Design Finalization Stage
  - Implement Response to Weaknesses
  - Design Excellence Peer Review
  - No Cost Nudges & Tweaks
  - Cost Balanced Trade-offs



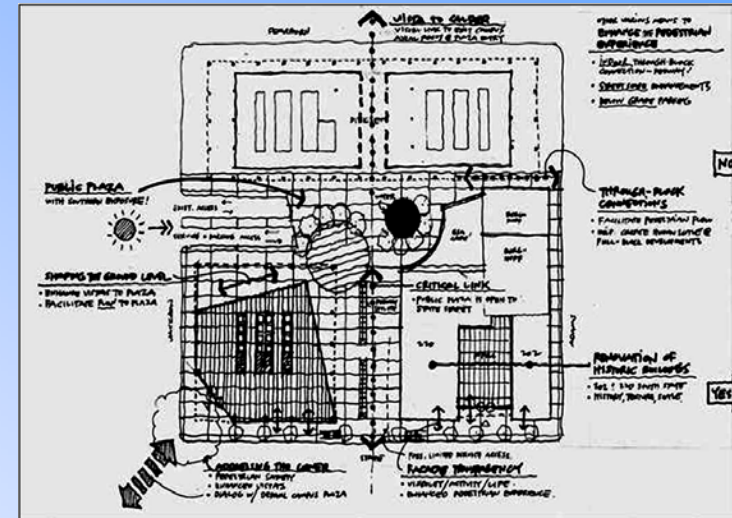
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# No Cost Nudges & Tweaks

- “Adjustments” to Concept.
  - Ex 1: Nudge Annex on Site to accommodate Security Sight Lines - \$0
  - Ex. 2: Reorient parking config. to accommodate security concerns - \$0



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# Cost Balanced Trade-offs

Move the money around within the budget

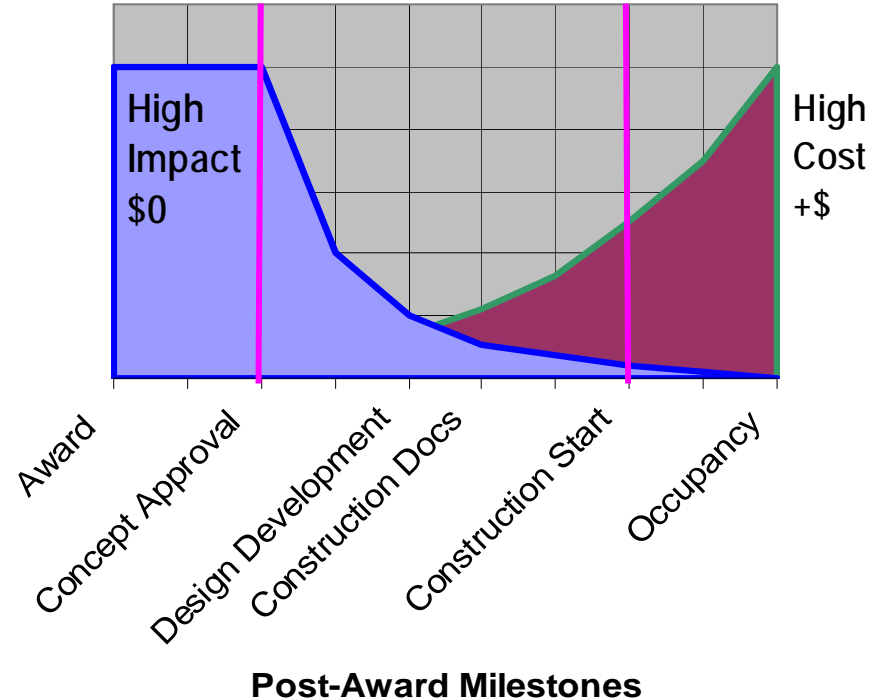


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# Cost Balanced Trade-offs

\$0 Trade-Off vs. +\$ Change Order



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# Post-Award Design Milestones

- Award
- Concept Design Finalization Stage
  - Implement Response to Weaknesses
  - Design Excellence Peer Review
  - No Cost Nudges & Tweaks
  - Cost Balanced Trade-offs
- Approve Final Concept
- Fast Track Design Development & Construction Documents Stages
  - Technical Reviews



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# Construction

**William Sonenberg**  
Program Manager  
Lease-Construction  
Great Lakes Region, PBS



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# Construction

- Design-Build – Fast Track Construction
  - What is to be Delivered?
    - Office Building
    - Vehicle Maintenance Annex
    - Secured Parking
    - Visitor Screening Facility
  - Delivered in accordance w/
    - Lease Contract
    - Construction Documents
    - Applicable Codes
    - Construction Industry Practices



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# Trade-Offs vs. Change Orders

- Trade-Offs
  - Total Constr. Budget & Scope Remain Unchanged
  - Reconciliation Process
- Change Orders
  - Change in Scope
  - Change in Budget
- In Either Case . . .
  - All Trade-Offs and Changes are Documented by A Supplemental Lease Agreement
  - Authorization can only come from Contracting Officer

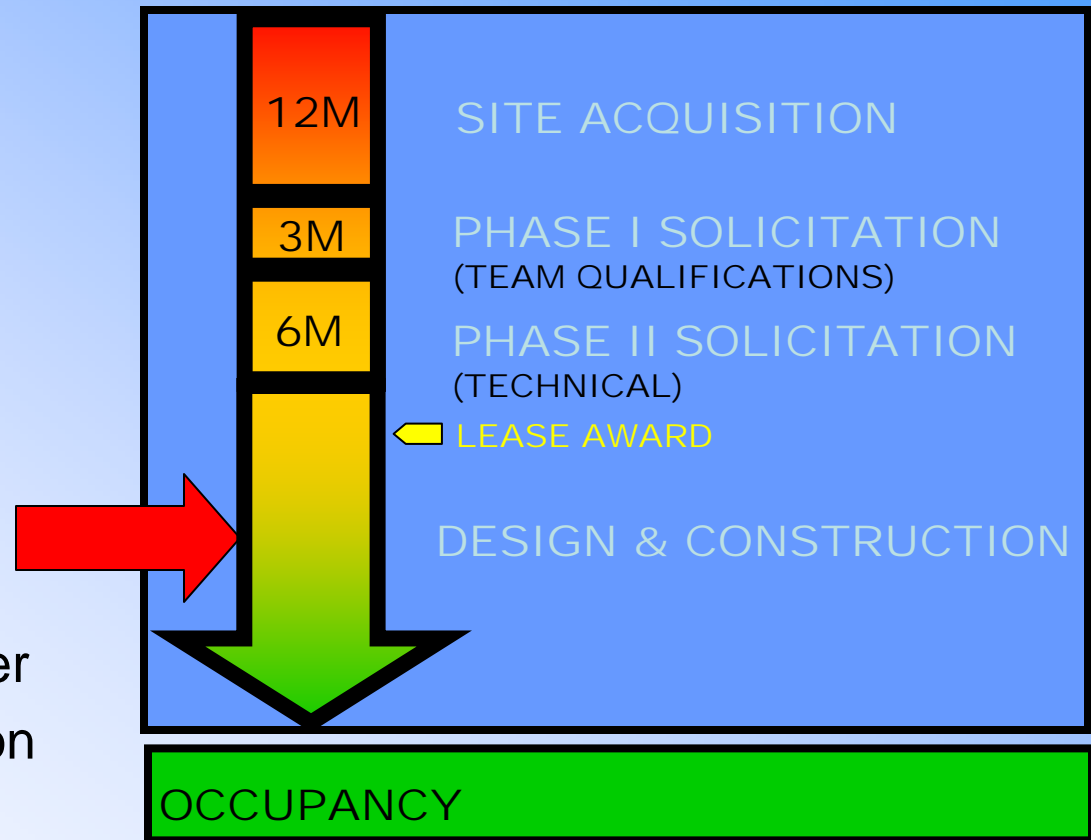


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# Construction Milestones

- Milestones:
  - Mobilization
  - Site Work
  - Foundations
  - Superstructure
  - Close-in Building
  - Building Power & HVAC
  - Early Space Turn Over
  - Substantial Completion
  - Occupancy



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# Schedule & Milestones

- Schedule
  - Incorporate Government Milestones into Construction Schedule
  - Early Turn-Over of Space
    - Government Contractor Access
    - Developer is Responsible for Access Coordination
    - FBI will Control Areas



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# Government On-Site Representative

- Approach May Differ from Region to Region
  - Government Hired Construction Manager, *or*
  - Perform with In-House Personnel
- Role of the Construction Manager
  - Provide Technical Support to the Government
  - Inspection/Monitoring/Observation



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# Site Security Procedures

- FBI Project Site Security Officer
- Access Control Facility
- Search and Inspection
- Timeframe for Background Checks



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# Substantial Completion

- Building is Ready for Occupancy
  - Building is Weather Tight
  - Security Provisions Complete
  - All Building Systems Complete
  - Back-up Systems Complete
  - All Systems Tests Complete and Accepted
  - All Systems Operational
  - Fire Marshal Acceptance Received
  - Certificate of Occupancy Received
- Only Minor punch list items



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# Future Enhancements

**Latrice Lacy**  
Contracting Officer  
Great Lakes Region, PBS

future?

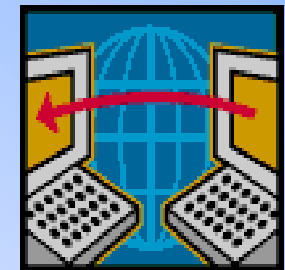
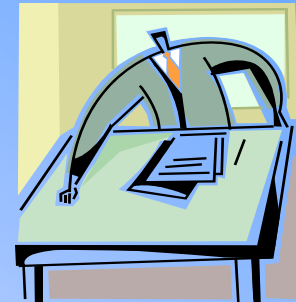
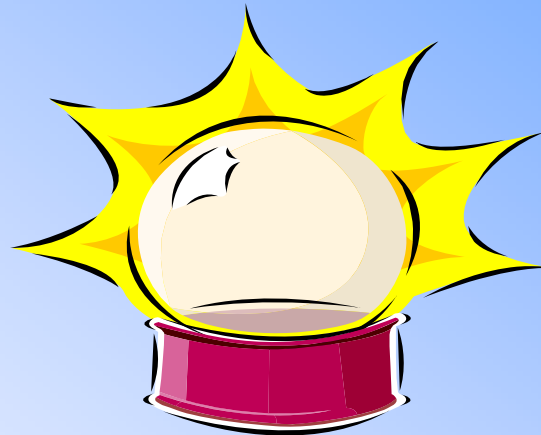


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# Future Enhancements

- Project Lessons Learned
- Improved Solicitation for Offer Documents
- Reduce Submittals
- Electronic Offer Submissions
- Reduce Procurement Time



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# Better Projects

- Developer
  - Less Paperwork
  - Shorter Time Invested
  - Better Product
- Government
  - Less Paperwork
  - Shorter Time Invested
  - Better Product



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# Closing & Panel Intro

**J. David Hood**  
Assistant Regional Administrator  
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# In Summary

- Public Significance
- Business Opportunity
- Business Alliance
- Public Image Opportunity
  - Strictly subject to GSA coordination & concurrence
- Complex Cycle & Undertaking
- Learning & Evolving



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# Panel Introduction

- Jeffrey Neely, ARA, PBS
- Fran Kern, FBI
- John Bouma, FBI
- Brian Whelan, PBS
- William Sonenberg, PBS
- Nan Wauchop, PBS
- Latrice Lacy, PBS
- Robert Theel, PBS
- David Hood, ARA, PBS



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