

1.0.0.0.0 Project Management Guide **Traditional Project Delivery Methods**

PM Guide

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

> **Traditional** Design/Build Design/Build-Bridging CMc

> > i





1.0.0.0.0.0 Project

Management Documents

2.0.0.0.0.0 Planning

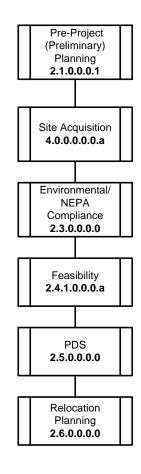
3.0.0.0.0.0 Authorization/ Funding

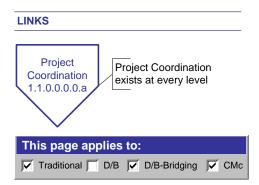
4.0.0.0.0 Site Acquisition

5.0.0.0.0 Design/Build

6.0.0.0.0.0 Design **7.0.0.0.0** Construction

8.0.0.0.0.0 Tenant

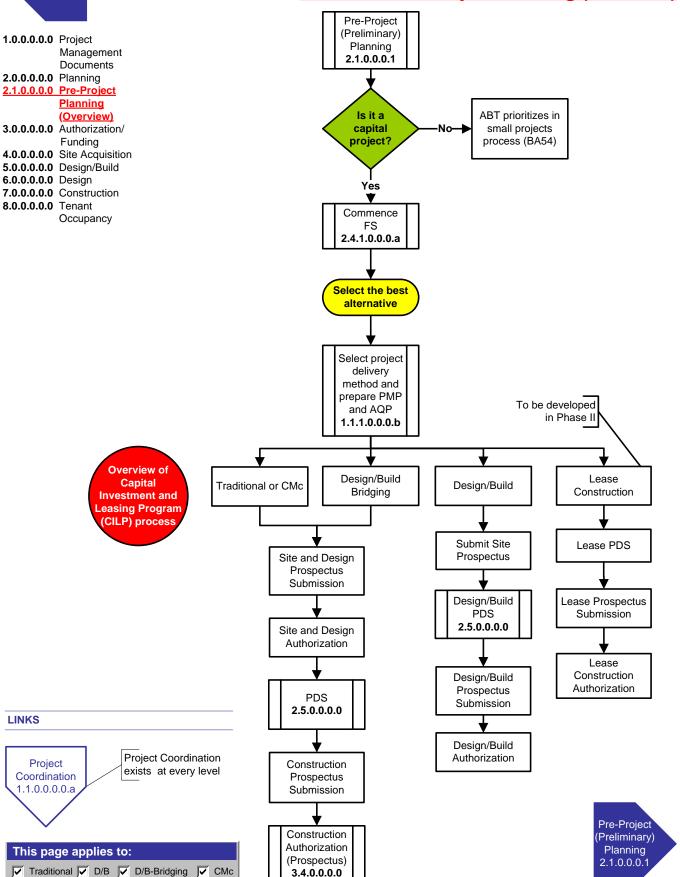








2.1.0.0.0.0 Pre-Project Planning (Overview)

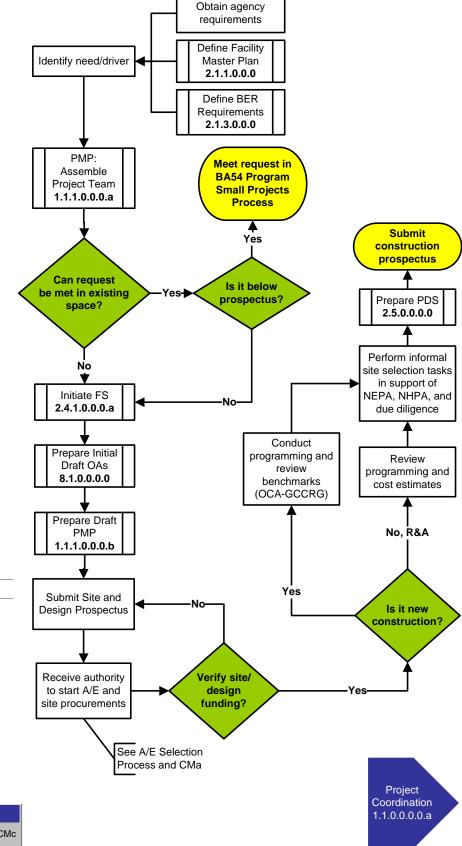


2.1.0.0.0.1 Pre-Project (Preliminary) Planning

1.0.0.0.0.0 Project
Management
Documents
2.0.0.0.0 Planning
2.1.0.0.0.1 Pre-Project
(Preliminary)
Planning
3.0.0.0.0.0 Authorization/
Funding
4.0.0.0.0 Site Acquisition
5.0.0.0.0 Design/Build
6.0.0.0.0 Design
7.0.0.0.0 Construction

Occupancy

8.0.0.0.0.0 Tenant





1.0.0.0.0 Project Management Documents *Traditional*1.1.0.0.0.0.a Project Coordination

Project

Coordination

exists at every

level

1.0.0.0.0.0 Project

Management

Documents

1.1.0.0.0.0.a Project Coordination

2.0.0.0.0. Planning **3.0.0.0.0.** Authorization/

Funding

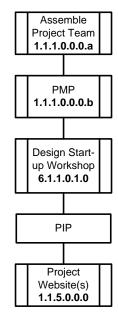
4.0.0.0.0.0 Site Acquisition

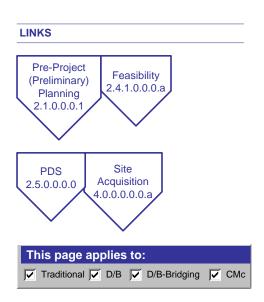
5.0.0.0.0 Design/Build

6.0.0.0.0.0 Design

7.0.0.0.0 Construction

8.0.0.0.0.0 Tenant









1.0.0.0.0 Project Management Documents *Traditional*

1.1.1.0.0.0.a PMP: Assemble Project Team

Asset Manager assembles Project Team

Management Documents 1.1.1.0.0.0.a PMP:

1.0.0.0.0.0 Project

Assemble Project

<u>Team</u>

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. Construction

8.0.0.0.0. Tenant

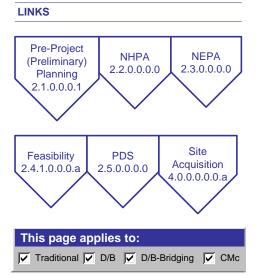
Occupancy

*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

Team Members

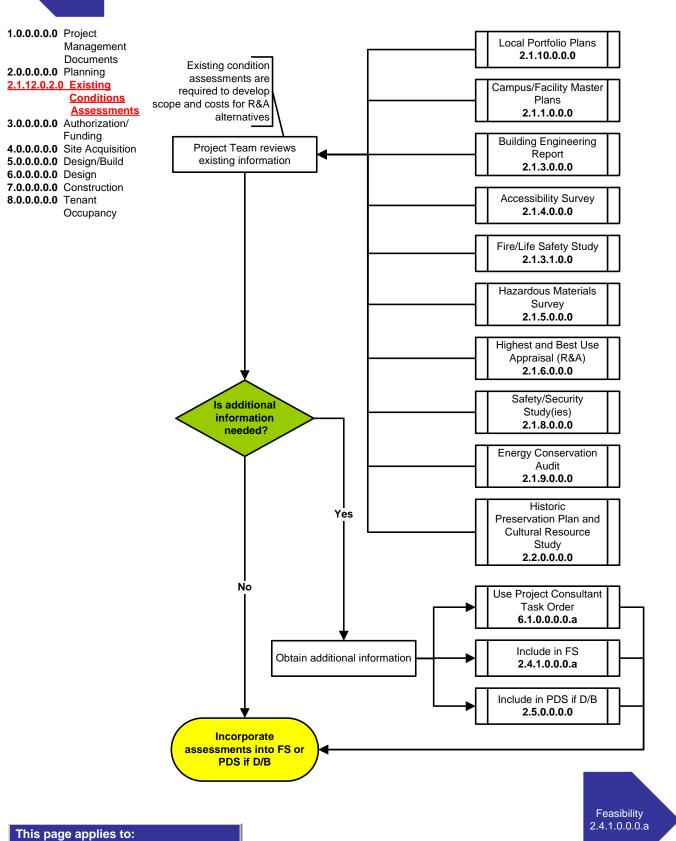
- 1. Customer
- 2. Asset Manager
- 3. Project Manager
- 4. Contracting Officer
- 5. Property Manager(s)
- 6. Realty Specialist
- 7. Regional Account Manager(s)
- 8. GSA Specialists*
- 9. DHS/FPS Representative
- 10. FTS and FSS Representatives
- 11. Regional NEPA Program Coordination
- 12. Regional Historic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

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.



Existing Conditions Assessments 2.1.12.0.2.0

2.1.12.0.2.0 Existing Conditions Assessments



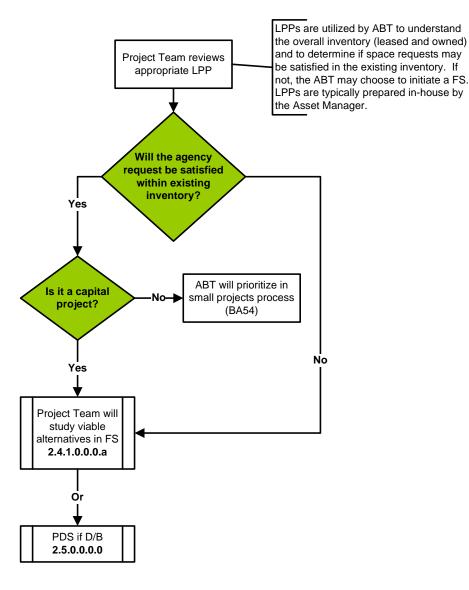
▼ Traditional ▼ D/B ▼ D/B-Bridging ▼ CMc

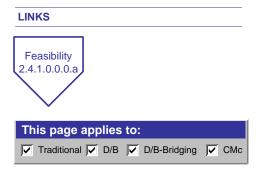


2.0.0.0.0 Planning *Traditional*2.1.10.0.0.0 Local Portfolio Plans

1.0.0.0.0.0 Project
Management
Documents
2.0.0.0.0 Planning
2.1.10.0.0 Local
Portfolio
Plans
3.0.0.0.0 Authorization/
Funding
4.0.0.0.0 Site Acquisition
5.0.0.0.0 Design/Build

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





Existing Conditions Assessments 2.1.12.0.2.0



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/

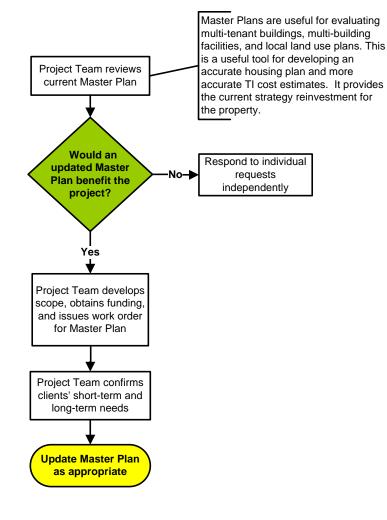
Funding

4.0.0.0.0. Site Acquisition **5.0.0.0.0.** Design/Build

6.0.0.0.0. Design

7.0.0.0.0 Construction

8.0.0.0.0.0 Tenant







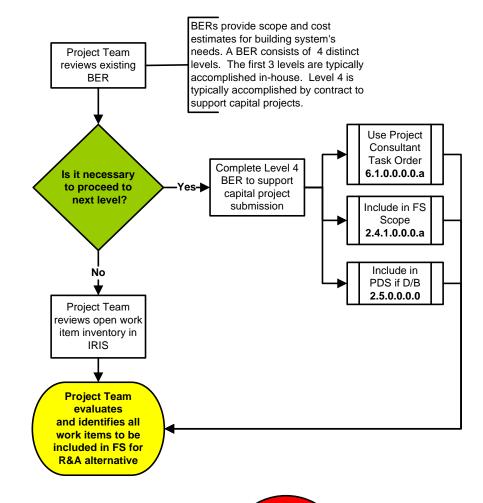


2.1.3.0.0.0 Building Engineering Report

1.0.0.0.0.0 Project
 Management
 Documents
2.0.0.0.0 Planning
2.1.3.0.0 Building
 Engineering
 Report
3.0.0.0.0 Authorization/
Funding
4.0.0.0.0 Site Acquisition
5.0.0.0.0 Design/Build
6.0.0.0.0 Design
7.0.0.0.0 Construction

Occupancy

8.0.0.0.0.0 Tenant



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

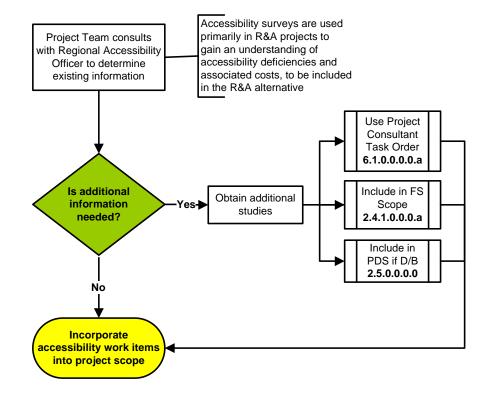


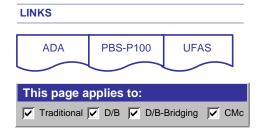


2.0.0.0.0 Planning Traditional 2.1.4.0.0.0 Accessibility Survey

1.0.0.0.0 Project
Management
Documents
2.0.0.0.0 Planning
2.1.4.0.0 Accessibility
Survey
3.0.0.0.0.0 Authorization/
Funding
4.0.0.0.0 Design/Build
6.0.0.0.0 Design
7.0.0.0.0 Tenant

Occupancy





Fire/Life Safety Study 2.1.3.1.0.0



2.0.0.0.0 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 Planning 2.1.3.1.0.0 Fire/Life

Safety Study

3.0.0.0.0.0 Authorization/ Funding

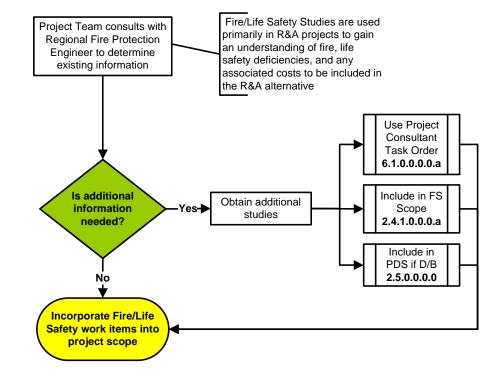
4.0.0.0.0 Site Acquisition

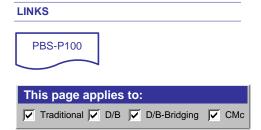
5.0.0.0.0. Design/Build **6.0.0.0.0.** Design

7.0.0.0.0 Construction

8.0.0.0.0.0 Tenant

Occupancy





Existing Conditions Assessments 2.1.12.0.2.0



2.0.0.0.0 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

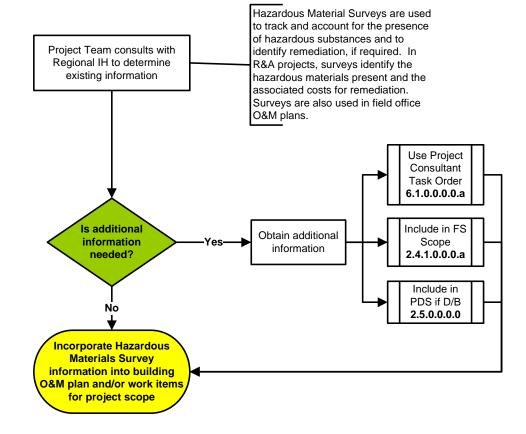
3.0.0.0.0. Authorization/ Funding

4.0.0.0.0 Site Acquisition **5.0.0.0.0** Design/Build

6.0.0.0.0.0 Design/Bi

7.0.0.0.0. Construction

8.0.0.0.0.0 Tenant







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

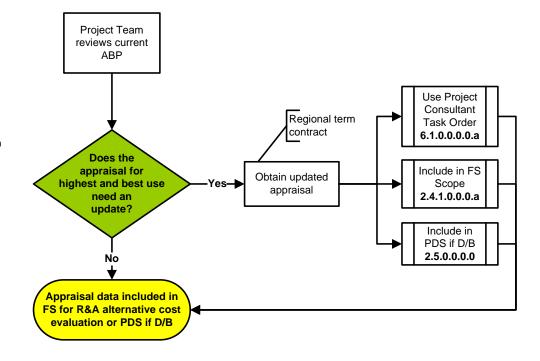
2.1.6.0.0.0 Highest and
Best Use
Appraisal
(R&A)

3.0.0.0.0.0 Authorization/ Funding

4.0.0.0.0. Site Acquisition **5.0.0.0.0.** Design/Build

6.0.0.0.0. Design **7.0.0.0.0.** Construction

8.0.0.0.0.0 Tenant







2.0.0.0.0.0 Planning **Traditional** 2.1.8.0.0.0 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. Planning

3.0.0.0.0 Authorization/

Funding

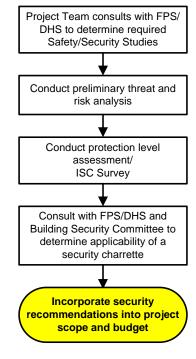
4.0.0.0.0. Site Acquisition

5.0.0.0.0 Design/Build 6.0.0.0.0 Design

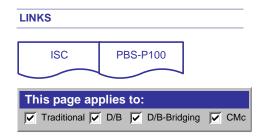
7.0.0.0.0. Construction

8.0.0.0.0.0 Tenant

Occupancy



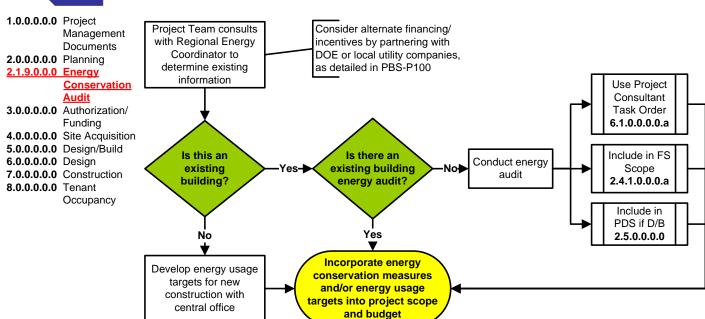
The benefits of a security charrette will be optimized when completed during the FS for inclusion in project scope and budget.

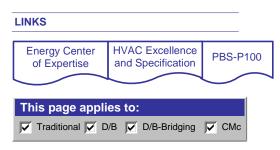


Energy Conservation Audit 2.1.9.0.0.0

Existing Conditions Assessments 2.1.12.0.2.0

2.0.0.0.0 Planning *Traditional*2.1.9.0.0.0 Energy Conservation Audit

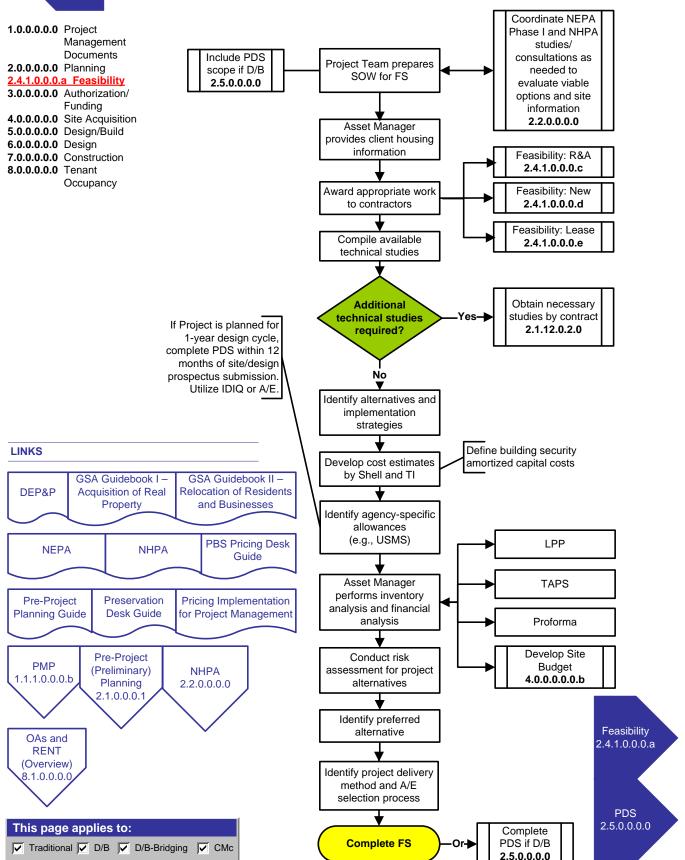




Existing Conditions Assessments 2.1.12.0.2.0

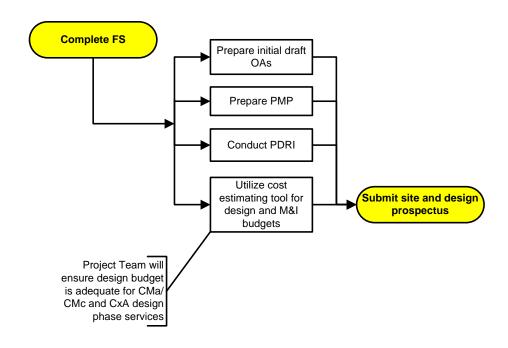
Existing Conditions Assessments 2.1.12.0.2.0

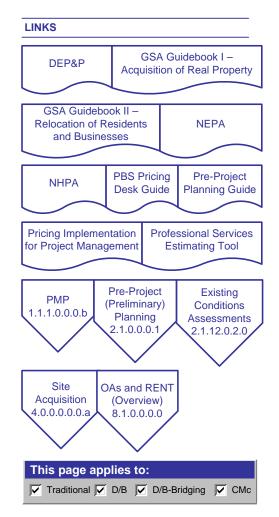
2.0.0.0.0.0 Planning *Traditional* 2.4.1.0.0.0.a Feasibility





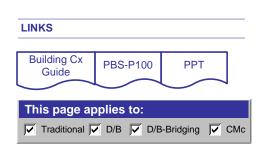
2.0.0.0.0 Planning Traditional 2.4.1.0.0.0.b Feasibility (Continued)





Feasibility: R&A 2.4.1.0.0.0.c

6.0.0.0.0.0 Design **Traditional** Feasibility 6.3.0.0.0 CMa/Commissioning Authority (Cx) Services 2.4.1.0.0.0.a **PDS** Programmatic Project Team determines level of The PPT contains WBS and 2.5.0.0.0.0 discussion may be CMa and Cx services required during detailed project tasks for Cx found in the Building each stage of the project IAW current and QAPs Cx Guide guidelines 1.0.0.0.0.0 Project Management Documents 2.0.0.0.0 Planning 3.0.0.0.0. Authorization/ Post Construction **Planning** Construction Design Funding 4.0.0.0.0 Site Acquisition CMa will perform services Project Team CMa will close out The CMa must be on 5.0.0.0.0. Design/Build will need Cx board at the same time as detailed in the SOW project as detailed in 6.0.0.0.0. Design SOW. If also completing and IAW CMAA assistance as the A/E for maximum 6.3.0.0.0.0 CMa/ during benefit/input starting with Construction Cx services, the CMa Commissioning preparation of design concepts Management Standards will conduct all post-Authority (Cx) the FS of Practice construction activities. Services 7.0.0.0.0 Construction 8.0.0.0.0.0 Tenant CxA services will also CxA executes Cx Plan as Occupancy **Develop preliminary** be maximized if on to performance, checklists, Cx Plan and required board at design testing and progress budget in FS concepts reports

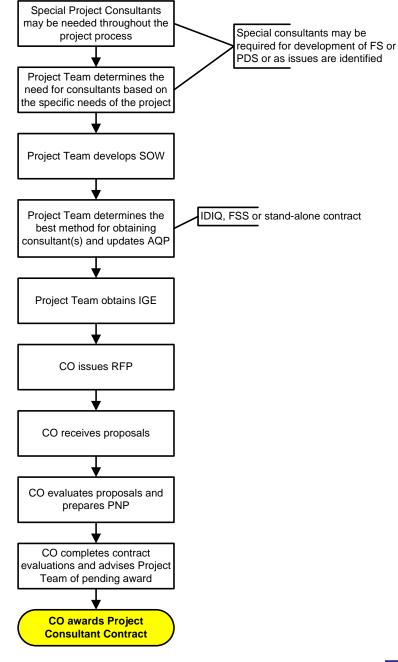


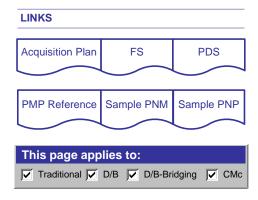
Cx Plan will be updated for the PDS and as needed by the Project Team





7.0.0.0.0.0 Construction 8.0.0.0.0.0 Tenant Occupancy









2.4.1.0.0.0.c Feasibility: R&A

1.0.0.0.0 Project

Management
Documents

2.0.0.0.0 Planning

2.4.1.0.0.c Feasibility:
R&A

3.0.0.0.0 Authorization/
Funding

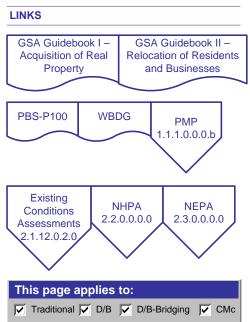
4.0.0.0.0 Site Acquisition

5.0.0.0.0 Design/Build

6.0.0.0.0 Design

7.0.0.0.0.0 Construction **8.0.0.0.0.0** Tenant Occupancy

Review accessibility Review fire safety Project Team Review hazardous conducts study materials based on construction type Review reinvestment index Review building systems needs **BER Blast** Concurrent evaluations Progressive collapse Glass fragmentation Seismic Energy R&A alternative has scope and budget data for <mark>analysis in Feasibility Phase</mark> Serviceability High wind Security Historic Environmental **LEED**



Feasibility 2.4.1.0.0.0.a



2.4.1.0.0.d Feasibility: New Construction

1.0.0.0.0.0 Project

Management Documents

2.0.0.0.0.0 Planning 2.4.1.0.0.0.d Feasibility:

<u>New</u>

Construction

3.0.0.0.0.0 Authorization/

Funding

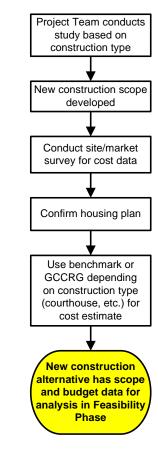
4.0.0.0.0 Site Acquisition

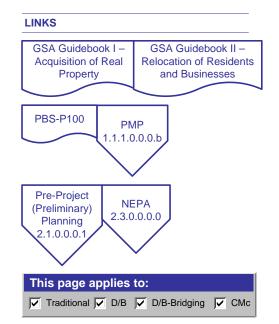
5.0.0.0.0 Design/Build

6.0.0.0.0.0 Design

7.0.0.0.0 Construction

8.0.0.0.0.0 Tenant









2.4.1.0.0.0.e Feasibility: Lease Construction

1.0.0.0.0.0 Project

Management

Documents

2.0.0.0.0.0 Planning 2.4.1.0.0.0.e Feasibility:

<u>Lease</u>

Construction

3.0.0.0.0.0 Authorization/

Funding

4.0.0.0.0 Site Acquisition

5.0.0.0.0 Design/Build

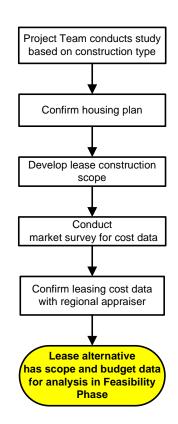
6.0.0.0.0. Design

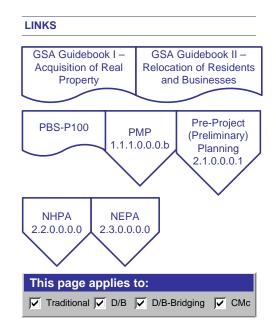
7.0.0.0.0 Construction

8.0.0.0.0. Tenant

Occupancy

Capital Lease Construction Module to be developed in Phase II of PM Guide





Feasibility 2.4.1.0.0.0.a



2.0.0.0.0 Planning *Traditional*4.0.0.0.0.0 Site Acquisition

1.0.0.0.0. Project

Management

Documents

2.0.0.0.0.0 Planning

4.0.0.0.0.a Site Acquisition

3.0.0.0.0 Authorization/

Funding

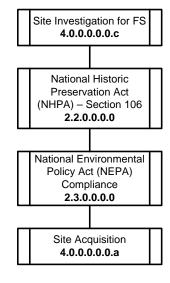
4.0.0.0.0.0 Site Acquisition

5.0.0.0.0. Design/Build

6.0.0.0.0. Design

7.0.0.0.0 Construction

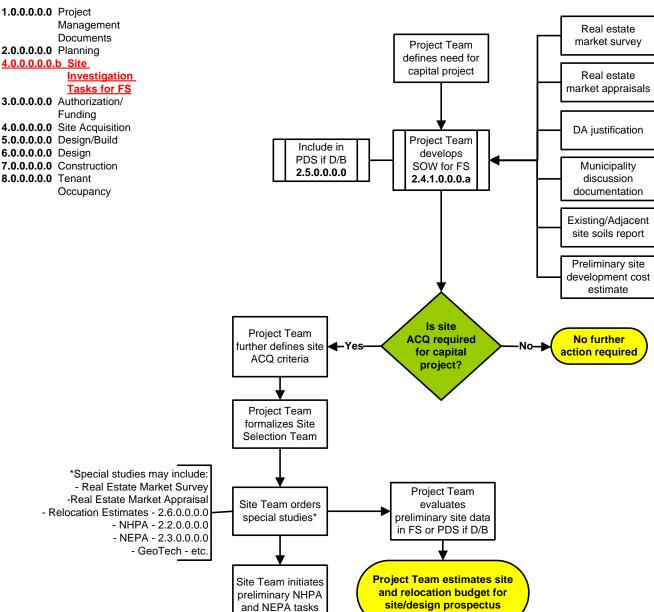
8.0.0.0.0.0 Tenant

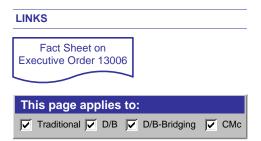






4.0.0.0.0.b Site Investigation Tasks for FS





Project Funding Request 2.4.4.0.0.0

and NEPA tasks

2.0.0.0.0.0 Planning **Traditional** Feasibility 2.4.1.0.0.0.a 4.0.0.0.0.c Site Investigation for FS The needs of the project will dictate the 1.0.0.0.0.0 Project level of Management Site studies are typically funded in information Documents Project Team will examine project BA61. Regional policy and study required 2.0.0.0.0.0 Planning needs and determine the level of funding levels will determine when 4.0.0.0.0.c Site informal investigation to be completed certain studies are completed. Investigation prior to formal Site Selection process for FS 3.0.0.0.0 Authorization/ **Funding** The process Project Team assigns team roles and commences with 4.0.0.0.0 Site Acquisition responsibilities 5.0.0.0.0. Design/Build the FS and continues through site selection 6.0.0.0.0.0 Design design and 7.0.0.0.0. Construction Project Team coordinates scope for FS construction as 8.0.0.0.0.0 Tenant project needs to address site needs of the project for Occupancy Due Diligence, NHPA, NEPA, et al. dictate Refer to DEP&P and PBS-P100 for site considerations. **Concurrent Activities Concurrent Activities Site Acquisition NEPA NHPA** Special Studies Due Site Acquisition Regional NEPA Program RHPO coordinates Diligence Specialist coordinates Coordinator manages NEPA Regional NEPA Program with SHPO. RHPO with RHPO and NEPA studies, public meetings, and briefs Project Team Coordinator manages/ Coordinator as needed mitigation measures. coordinates studies (Due on progress of Specialist manages Coordinator provides regular consultation(s). Diligence) with Site technical studies, updates to Project Team. 2.2.0.0.0.0 **Acquisition Specialist** appraisals and 2.3.0.0.0.0 relocation estimates and updates Project Team on costs and Allow 6-12 Allow 6-15 status. months in months in 4.0.0.0.0.a project schedule project schedule Site Investigation - 12-18 All data is utilized in FS (or PDS if D/B) months with FS and PDS for determination of viable alternatives Site Acquisition - 12-18 and associated cost impacts months from Site Directive to Closing **LINKS** GSA Guidebook I -GSA Guidebook II -DEP&P A process Acquisition of Real Relocation of Residents overview of Site, NHPA and Businesses **Property** NHPA, Due Diligence, 2.2.0.0.0.0 NEPA, et al., may be found in the **NEPA NHPA** PBS-P100 Library of the PM Guide

GSA - Public Buildings Service 4.0.0.0.0.c Planning Page 25

Relocation

Planning

2.6.0.0.0.0

PMP: Assemble

Project Team

1.1.1.0.0.0.a

This page applies to:

PMP

1.1.1.0.0.0.b

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

Planning

2.0.0.0.0.0

NEPA 2.3.0.0.0.0

Feasibility 2.4.1.0.0.0.a



2.2.0.0.0.0 NHPA Tasks for FS through Site Acquisition

1.0.0.0.0.0 Project

Management

Documents

2.0.0.0.0 Planning 2.2.0.0.0.0 NHPA Tasks

for FS through

<u>Site</u>

Acquisition

3.0.0.0.0.0 Authorization/ Funding

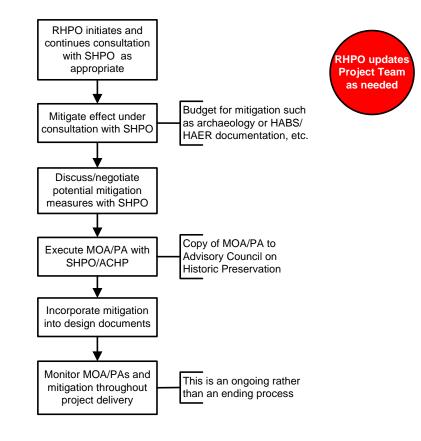
4.0.0.0.0.0 Site Acquisition

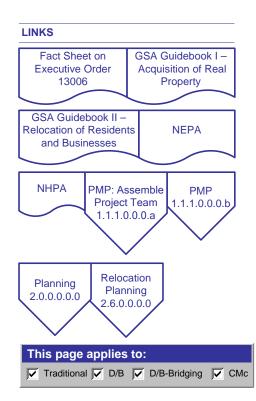
5.0.0.0.0 Design/Build

6.0.0.0.0.0 Design 7.0.0.0.0 Construction

8.0.0.0.0.0 Tenant

Occupancy



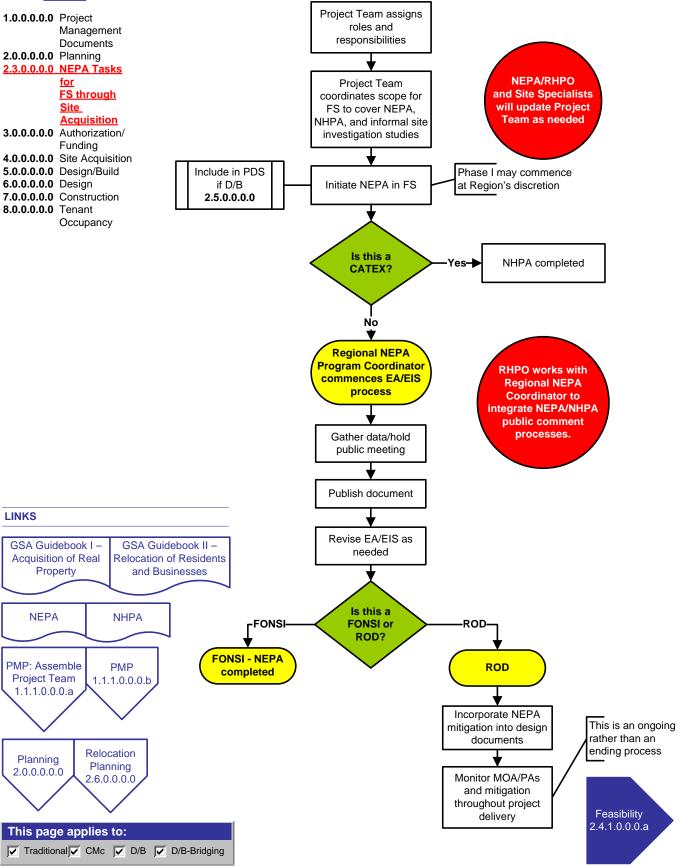


RHPO works with **Regional NEPA** Coordinator to integrate **NEPA/NHPA** public comment processes.

> Feasibility 2.4.1.0.0.0.a



2.3.0.0.0 NEPA Tasks for FS through Site Acquisition

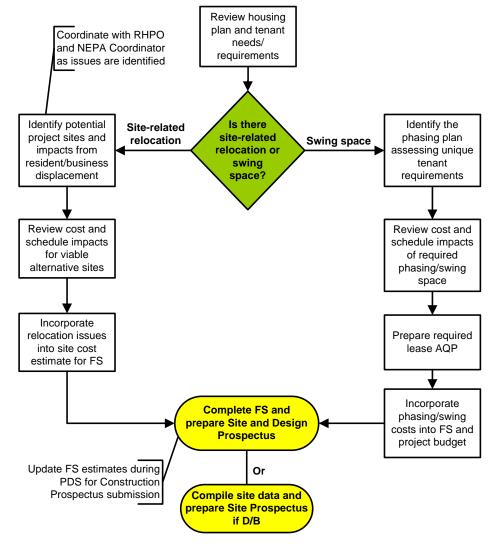




2.0.0.0.0 Planning Traditional 2.6.0.0.0 Relocation Planning

1.0.0.0.0 Project
Management
Documents
2.0.0.0.0 Planning
2.6.0.0.0 Relocation
Planning
3.0.0.0.0 Authorization/
Funding
4.0.0.0.0 Site Acquisition
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7.0.0.0.0 Construction
8.0.0.0.0

Occupancy





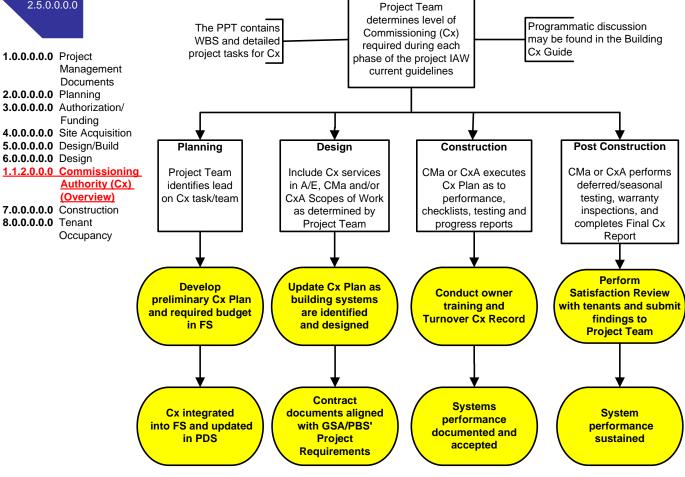
Feasibility 2.4.1.0.0.0.a

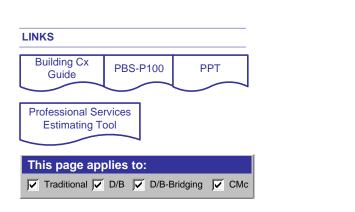
Feasibility 2.4.1.0.0.0.a **PDS** 2.5.0.0.0.0

Traditional

2.0.0.0.0.0 Planning

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 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

Pre-Project (Preliminary) Planning 2.1.0.0.0.1

1.0.0.0.0. Project Management Documents **Traditional**

1.1.1.0.0.0.b Project Management Plan (PMP)

1.0.0.0.0 Project Management Documents

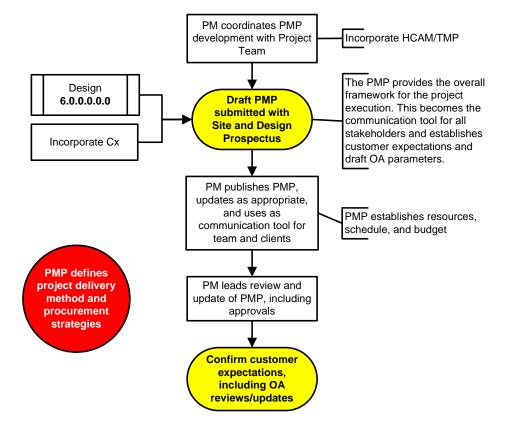
1.1.1.0.0.0.b Project

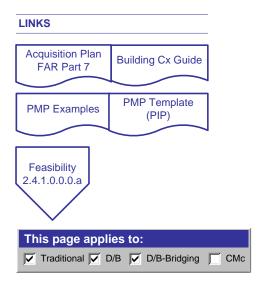
Management Plan (PMP)

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

6.0.0.0.0.0 Design 7.0.0.0.0 Construction 8.0.0.0.0.0 Tenant Occupancy





Project Updates in PIP 1.1.3.2.0.0



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/

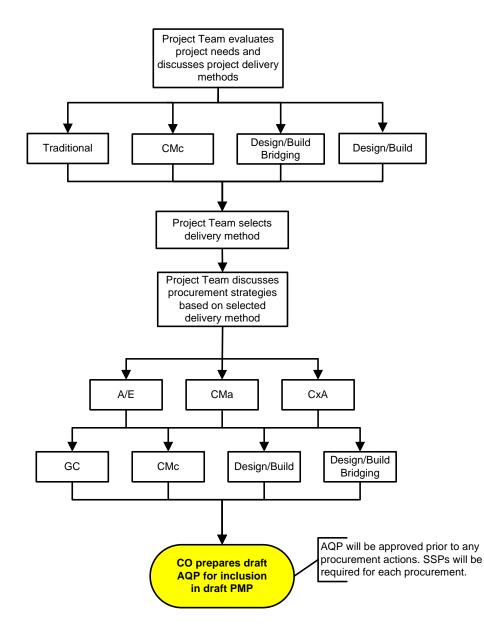
Program/ Project

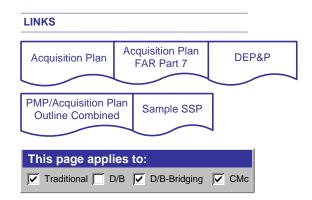
2.0.0.0.0 Planning
3.0.0.0.0 Authorization/
Funding

4.0.0.0.0. Site Acquisition **5.0.0.0.0.** Design/Build

6.0.0.0.0.0 Design

7.0.0.0.0. Construction **8.0.0.0.0.** Tenant









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

Snapshot

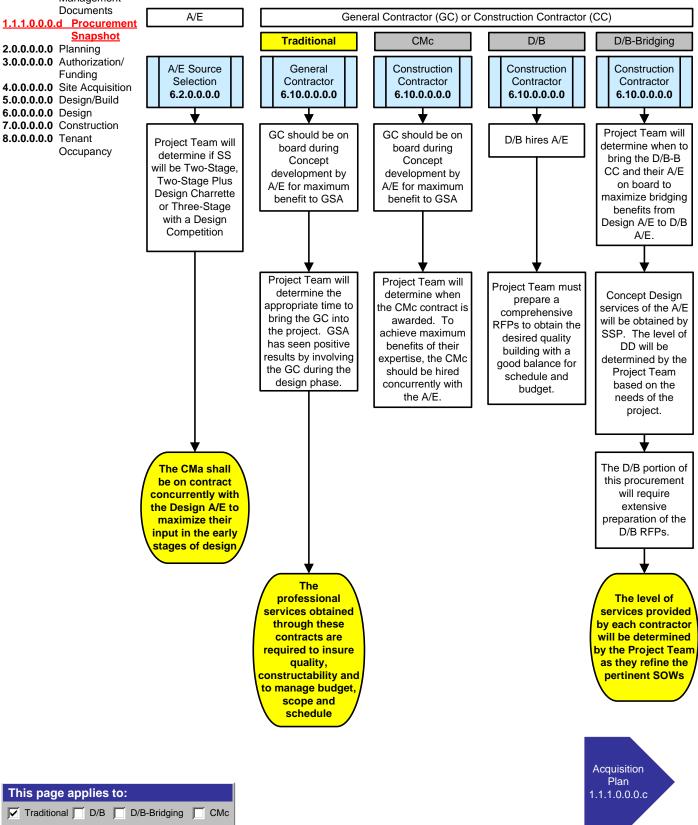
3.0.0.0.0 Authorization/

5.0.0.0.0 Design/Build

6.0.0.0.0.0 Design

8.0.0.0.0.0 Tenant

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





1.0.0.0.0 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 Planning 3.0.0.0.0 Authorization/ Funding

4.0.0.0.0 Site Acquisition

5.0.0.0.0. Design/Build **6.0.0.0.0.** Design

7.0.0.0.0.0 Construction 8.0.0.0.0.0 Tenant

8.0.0.0.0.0 Tenant Occupancy

Construction

Concurrent with A/E selection 6.3.1.0.0.0.a

Manager as Agent

(CMa)

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

Commissioning Agent (CxA)

REQUIRED PROFESSIONAL SERVICES FOR

CAPITAL CONSTRUCTION PROJECTS:

Concurrent with A/E selection 6.3.1.0.0.0.b

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.

Art-in-Architecture (AiA)

Design Task Order concurrent with A/E NTP 6.1.0.0.0.b

The process is outlined in the Guide for AiA OCA Program managers are available on this sensitive program.

> 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**

Other Specialty Consultants

Project Team determines the need and timing. **6.1.0.0.0.a**

Procurement procedures apply. Specialty Consultants may be a separate contract or a part of other services provided by CMa, CMc, GC/CC.

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





1.0.0.0.0.0 Project

Management Documents

1.1.1.0.0.0.f Procurement

Recap

2.0.0.0.0.0 Planning

3.0.0.0.0 Authorization/

Funding

4.0.0.0.0.0 Site Acquisition

5.0.0.0.0 Design/Build

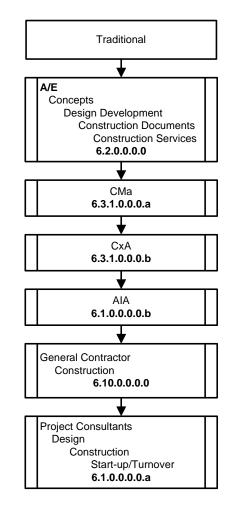
6.0.0.0.0.0 Design

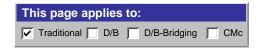
7.0.0.0.0 Construction

8.0.0.0.0.0 Tenant

Occupancy

1.0.0.0.0 Project Management Documents *Traditional*1.1.1.0.0.0.f Procurement Recap







1.0.0.0.0 Project Management Documents *Traditional*1.1.3.1.0.0 Initiate Project in PIP

1.0.0.0.0 Project

Management

Documents

1.1.3.1.0.0 Initiate Project

<u>in PIP</u>

2.0.0.0.0.0 Planning **3.0.0.0.0.0** Authorization/

Funding

4.0.0.0.0 Site Acquisition

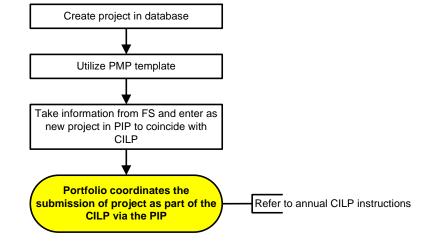
5.0.0.0.0 Design/Build

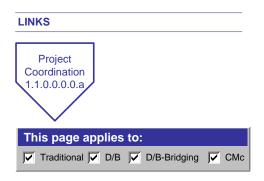
6.0.0.0.0.0 Design

7.0.0.0.0 Construction

8.0.0.0.0.0 Tenant

Occupancy





Project Updates in PIP 1.1.3.2.0.0



1.0.0.0.0 Project Management Documents **Traditional** 1.1.3.2.0.0 Project Updates in PIP

1.0.0.0.0.0 Project Management Documents 1.1.3.2.0.0 Project Updates

in PIP

2.0.0.0.0.0 Planning

3.0.0.0.0. Authorization/ Funding

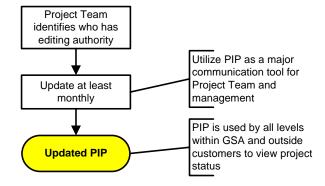
4.0.0.0.0 Site Acquisition

5.0.0.0.0 Design/Build

6.0.0.0.0.0 Design 7.0.0.0.0 Construction

8.0.0.0.0.0 Tenant

Occupancy



LINKS

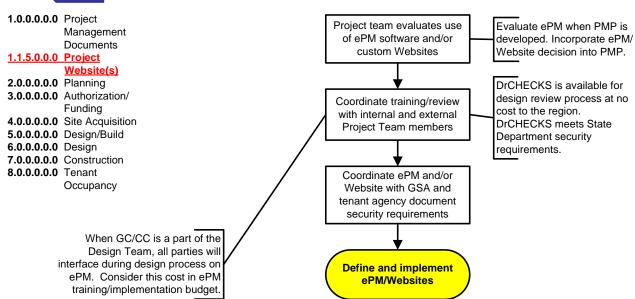


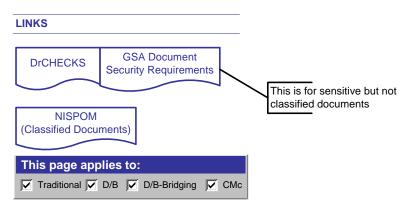




Project Coordination 1.1.0.0.0.0.a

1.0.0.0.0 Project Management Documents Traditional 1.1.5.0.0.0 Project Website(s)





Project Coordination 1.1.0.0.0.0.a



3.0.0.0.0 Authorization/Funding *Traditional*

2.4.4.0.0.0 Project Funding Request

OMB includes site/

design prospectus in

President's budget

3.4.5.0.0.0 Budget Authorization Act (Congressional Approval)

1.0.0.0.0.0 Project Management **Documents** 2.4.4.0.0.0 Project Funding Request Regions submit 3.4.5.0.0.0 Budget Region obtains funding draft prospectus **Authorization** commences formal site based on CILP requirements ACQ process and awards (Congressional A/E contract Approval) 2.0.0.0.0.0 Planning 3.0.0.0.0. Authorization/ **Funding** Central Office Region submits 4.0.0.0.0 Site Acquisition reviews allowance request 5.0.0.0.0 Design/Build submissions OCA hosts to Central Office 6.0.0.0.0.0 Design Courthouse 7.0.0.0.0 Construction Orientation and 8.0.0.0.0.0 Tenant Design Start Occupancy Central Office runs Workshops expert choice 6.1.1.0.1.0 model and prioritizes OCA issues project projects directive This includes House and Central Office **Congress approves** Senate authorization and budget for site/design submits appropriation prospectus to OMB Project Team commences work on PDS 2.5.0.0.0.0

Approved

OMB

passback



Project may be

resubmitted in a

future FY

Not approved





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. Authorization/

Funding

4.0.0.0.0 Site Acquisition

5.0.0.0.0 Design/Build

6.0.0.0.0 Design

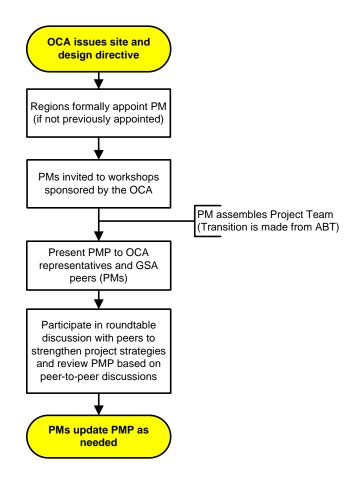
7.0.0.0.0 Construction

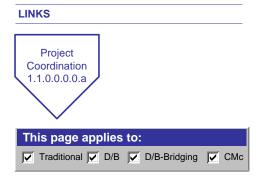
8.0.0.0.0.0 Tenant

Occupancy

1.0.0.0.0 Project Management Documents Traditional

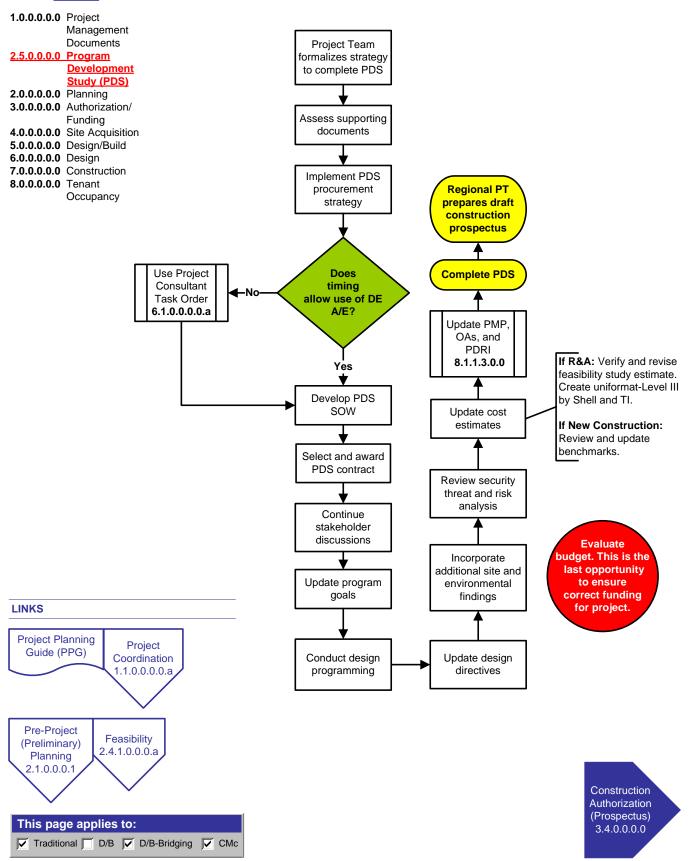
6.1.1.0.1.0 Courthouse Orientation and Design Start Workshop





2.0.0.0.0.0 Planning Traditional

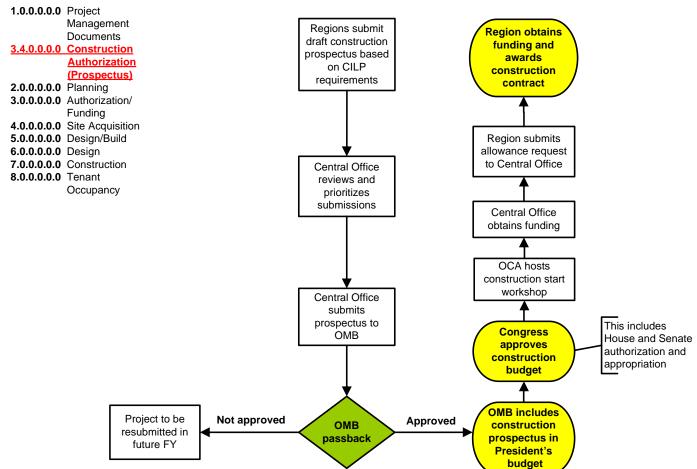
2.5.0.0.0 Program Development Study (PDS)





3.0.0.0.0 Authorization/Funding *Traditional*

3.4.0.0.0 Construction Authorization (Prospectus)







6.0.0.0.0.0 Design *Traditional* 6.0.0.0.0.0 Design

1.0.0.0.0 Project

Management
Documents

2.0.0.0.0 Planning
3.0.0.0.0 Authorization/
Funding

4.0.0.0.0 Site Acquisition
5.0.0.0.0 Design/Build
6.0.0.0.0 Design

7.0.0.0.0 Construction
8.0.0.0.0 Tenant
Occupancy

Site Investigation Tasks for FS 4.0.0.0.0.b **Procurements** Site Acquisition proceed based on the 4.0.0.0.0.0.a strategies in the PMP and IAW funding guidance and the Site/Design A/E Procurement **Directives letter** (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 GC Procurement commences when contract drawings are Construction complete Documents 6.9.0.0.0.0

FAR

GSA Guidebook I –
Acquisition of Real
Property

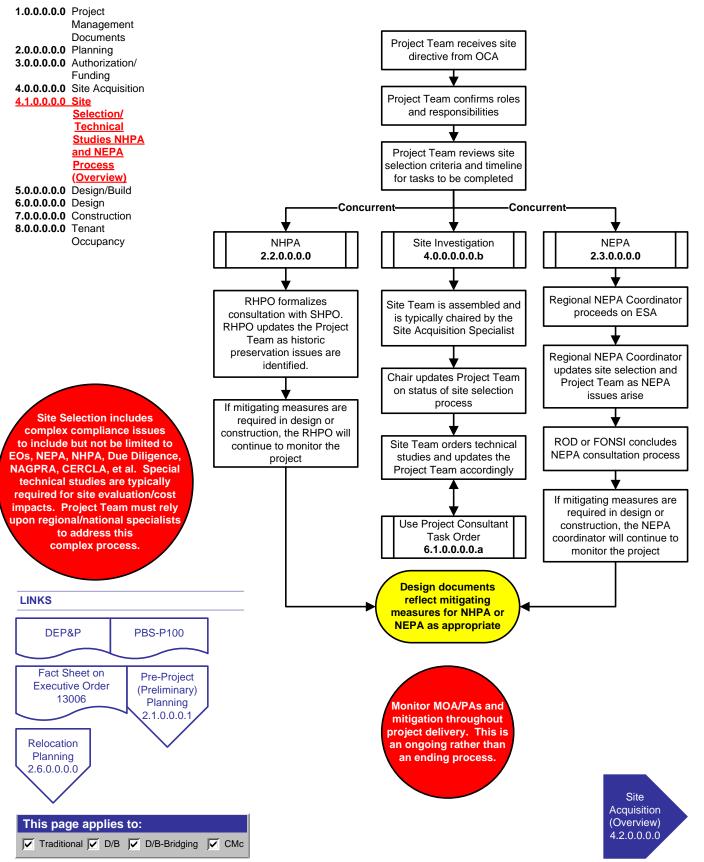
This page applies to:

Traditional D/B D/B-Bridging CMc

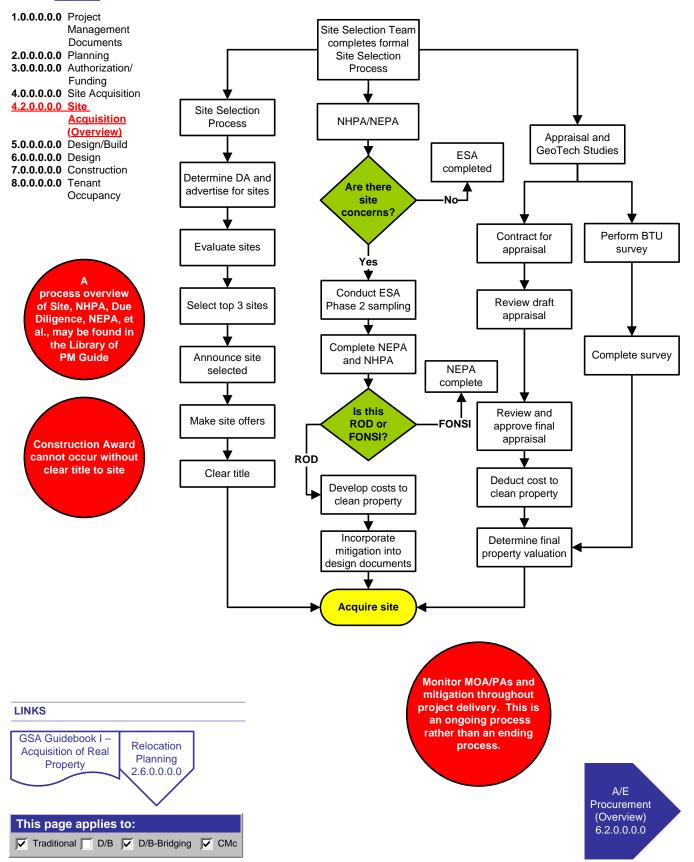
Site Selection/ Technical Studies NHPA and NEPA Process (Overview) 4.1.0.0.0.0



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



6.0.0.0.0 Design *Traditional*4.2.0.0.0 Site Acquisition (Overview)





6.0.0.0.0.0 Design **Traditional** 6.2.0.0.0 A/E Procurement (Overview)

1.0.0.0.0.0 Project Management

Documents

2.0.0.0.0 Planning **3.0.0.0.0.** Authorization/

Funding

4.0.0.0.0. Site Acquisition 5.0.0.0.0 Design/Build

6.0.0.0.0 Design

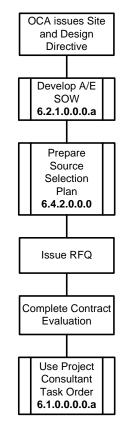
6.2.0.0.0.0 A/E

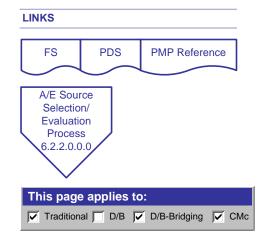
Procurement (Overview)

7.0.0.0.0 Construction

8.0.0.0.0.0 Tenant

Occupancy







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 Planning

3.0.0.0.0 Authorization/

Funding

4.0.0.0.0.0 Site Acquisition 5.0.0.0.0 Design/Build

6.0.0.0.0.0 Design

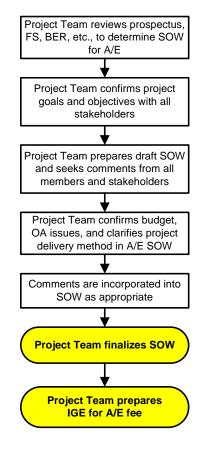
6.2.1.0.0.0.a A/E Services

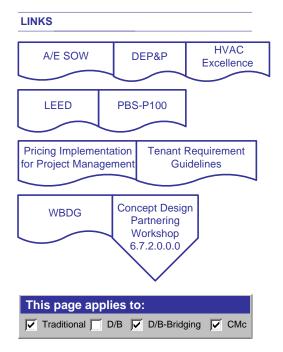
Scope of Work

(Overview) 7.0.0.0.0. Construction

8.0.0.0.0.0 Tenant

Occupancy





Source Selection Plan 6.4.2.0.0.0

6.0.0.0.0.0 Design

6.2.2.0.0.0



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. Authorization/

Funding

4.0.0.0.0.0 Site Acquisition

5.0.0.0.0 Design/Build

6.0.0.0.0.0 Design

6.2.1.0.0.0.b Design

Charrette (Optional)

7.0.0.0.0. Construction 8.0.0.0.0.0 Tenant

Occupancy

Project Team conducts Design

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

Phase I

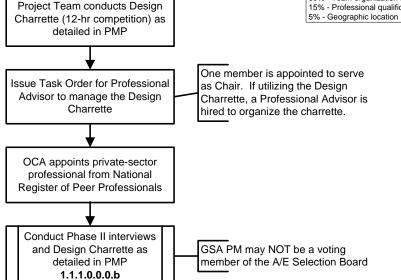
35% - Design Firm - past performance 25% - Lead Designer's philosophy and design layout 25% - Lead Designer's portfolio

15% - Lead Designer's profile

Phase II 50% - Team design performance

30% - Team organization and management

15% - Professional qualifications





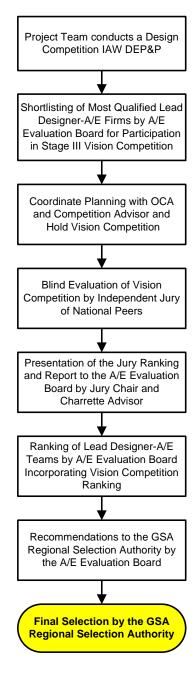
A/E Source Selection/ **Evaluation** Process 6.2.2.0.0.0

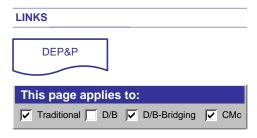


6.0.0.0.0 Design *Traditional*6.2.1.0.0.c Design Competition

1.0.0.0.0.0 Project
Management
Documents
2.0.0.0.0 Planning
3.0.0.0.0 Authorization/
Funding
4.0.0.0.0 Site Acquisition
5.0.0.0.0 Design/Build
6.0.0.0.0 Design
6.2.1.0.0.c Design
Competition

7.0.0.0.0.0 Construction 8.0.0.0.0.0 Tenant Occupancy

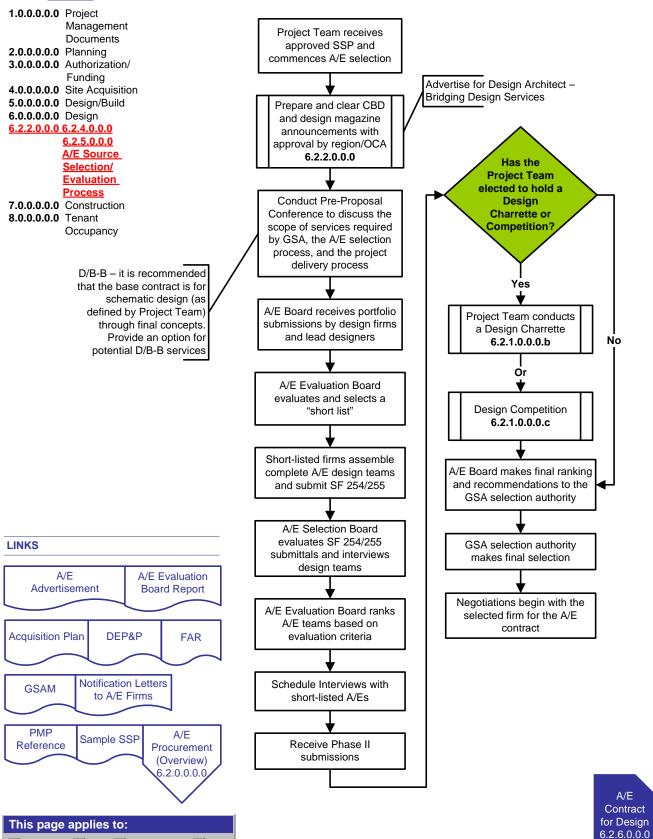




A/E Contract for Design 6.2.6.0.0.0



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



▼ Traditional D/B D/B-Bridging CMc

A/E Source Selection/ Evaluation **Process** 6.2.2.0.0.0

Traditional 6.2.6.0.0.0 A/E Contract for Design

6.0.0.0.0 Design

1.0.0.0.0.0 Project Management Documents 2.0.0.0.0.0 Planning

3.0.0.0.0. Authorization/

Funding 4.0.0.0.0.0 Site Acquisition

5.0.0.0.0 Design/Build

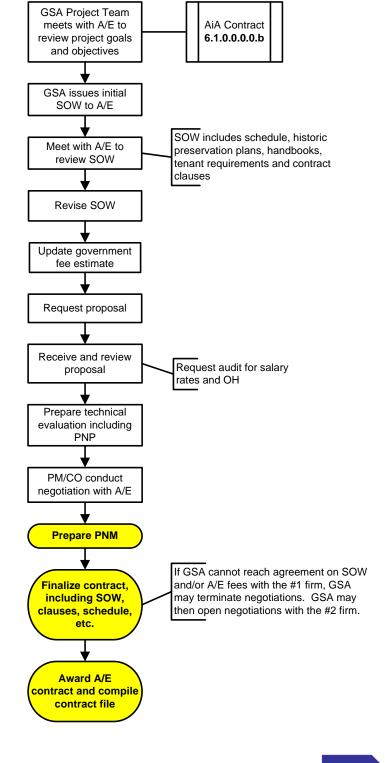
6.0.0.0.0.0 Design

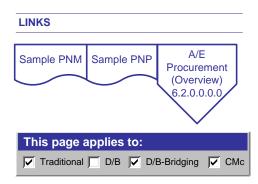
6.2.6.0.0.0 A/E Contract for Design

7.0.0.0.0.0 Construction

8.0.0.0.0.0 Tenant

Occupancy





CMa/ Commissioning Authority (Cx) Services 6.3.0.0.0.0



6.0.0.0.0 Design Traditional 6.3.1.0.0.0 CMa Scope of Work

1.0.0.0.0. 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

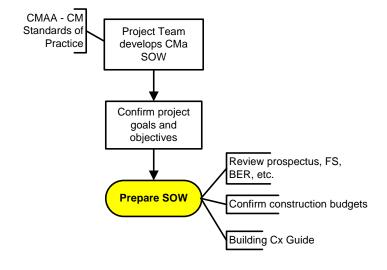
5.0.0.0.0 Design/Build **6.0.0.0.0** Design

6.3.1.0.0.0.a CMa Scope of Work

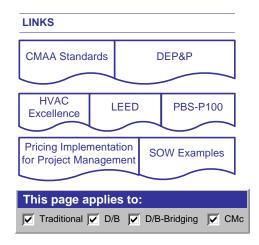
7.0.0.0.0. Construction

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.



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)

1.0.0.0.0 Project

Management

Documents

2.0.0.0.0.0 Planning

3.0.0.0.0 Authorization/

Funding

4.0.0.0.0. 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

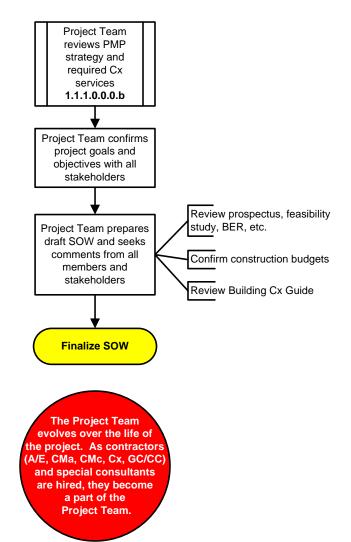
Work (if apart

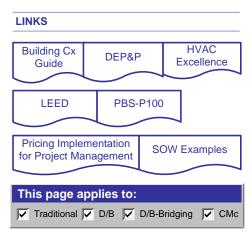
from CMa)

7.0.0.0.0.0 Construction

8.0.0.0.0.0 Tenant

Occupancy









1.0.0.0.0.0 Project

6.0.0.0.0.0 Design Traditional

6.3.2.0.0.0 CMa Task Order/ CxA Task Order

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
6.3.2.0.0 CMa Task
Order/CxA
Task Order

7.0.0.0.0 Construction
8.0.0.0.0 Tenant
Occupancy

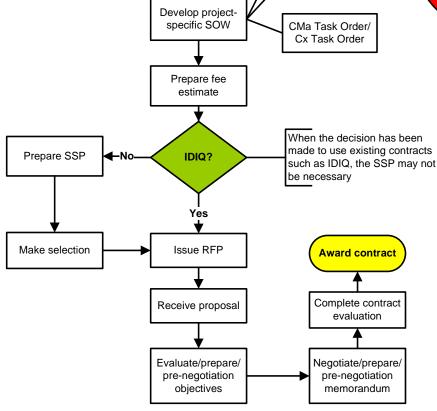
The Project reviews PMP and Team evolves over validates level of the life of the project. As services required contractors (A/E, CMa, from CMa CMc, Cx, GC/CC) and special consultants are hired, they become a Begin CMa part of the Project procurement for Team. new contracts

Review Cx Plan

Review Prospectus

Planning Documents

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.



Project Team

Verify funding

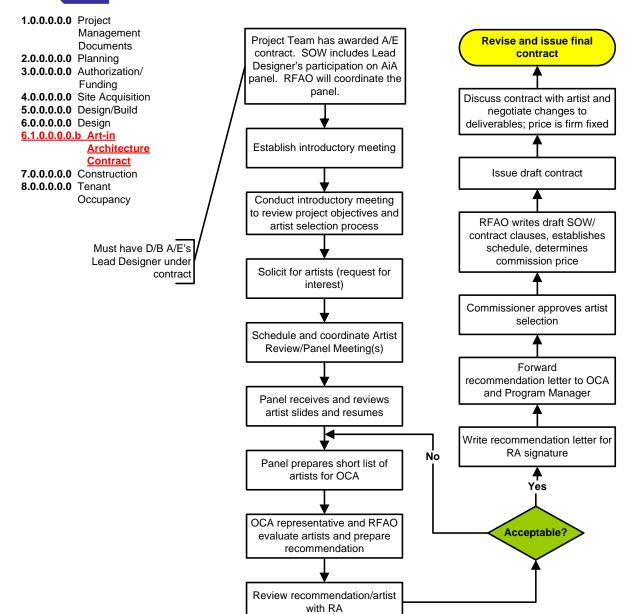
Confirm AQP

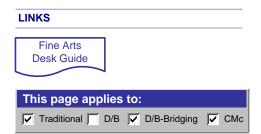
This page applies to:

Traditional D/B D/B-Bridging CMc

CxA SOW (if apart from CMa) 6.3.1.0.0.0.b

6.1.0.0.0.0.b Art-in-Architecture Contract





Concept Design (Overview) 6.7.0.0.0.0



6.7.0.0.0 Concept Design (Overview)

1.0.0.0.0.0 Project

Management

Documents

2.0.0.0.0. Planning **3.0.0.0.0.** Authorization/

Funding

4.0.0.0.0.0 Site Acquisition

5.0.0.0.0 Design/Build

6.0.0.0.0.0 Design

6.7.0.0.0.0 Concept

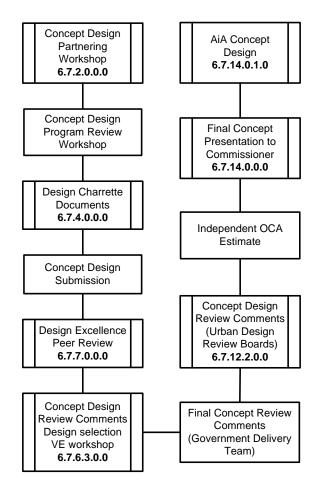
Design

(<u>Overview</u>) **7.0.0.0.0.** Construction

8.0.0.0.0.0 Tenant

Occupancy

Some processes may be concurrent









6.0.0.0.0.0 Design **Traditional 6.7.0.0.0.1.a Concept Design**



LINKS

A/E SOW

AiA

Design Review

Checklist

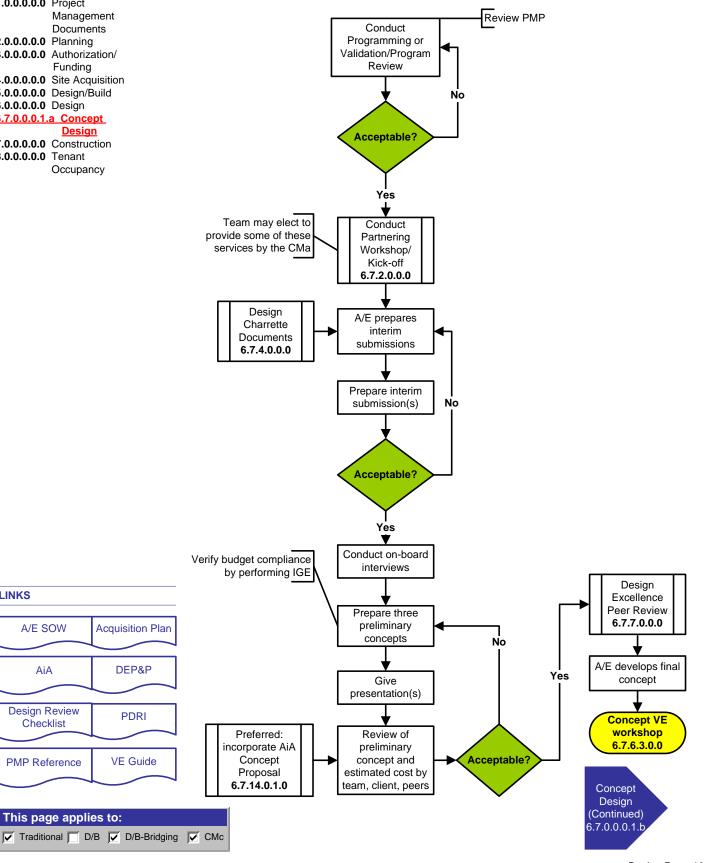
PMP Reference

This page applies to:

DEP&P

PDRI

VE Guide





6.0.0.0.0 Design *Traditional* 6.7.0.0.1.b Concept Design (Continued)

1.0.0.0.0.0 Project

Management

Documents

2.0.0.0.0.0 Planning

3.0.0.0.0 Authorization/

Funding

4.0.0.0.0.0 Site Acquisition

5.0.0.0.0 Design/Build

6.0.0.0.0.0 Design

6.7.0.0.0.1.b Concept

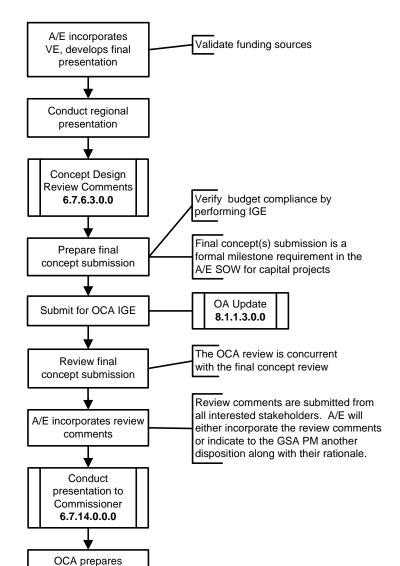
<u>Design</u>

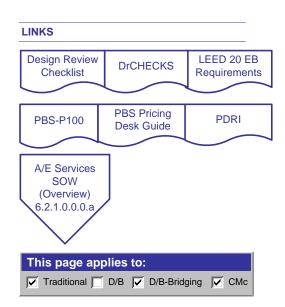
(Continued)
7.0.0.0.0 Construction

8.0.0.0.0.0 Tenant

Occupancy

Use Agency Design Guides





Concept Design Partnering Workshop 6.7.2.0.0.0

Commissioner's final concept approval

memorandum

Issue NTP for DD phase



6.7.2.0.0.0 Concept Design Partnering Workshop

1.0.0.0.0.0 Project

Management

Documents

2.0.0.0.0 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

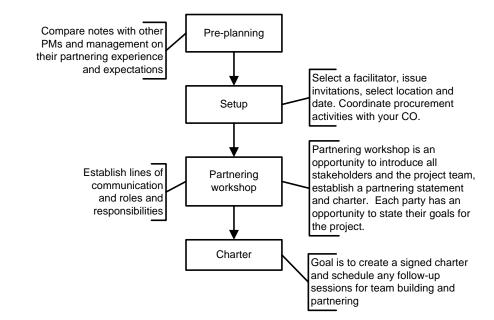
Design

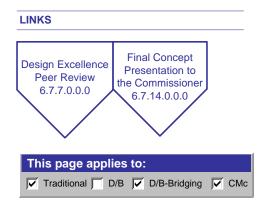
<u>Partnering</u>

Workshop 7.0.0.0.0 Construction

8.0.0.0.0.0 Tenant

Occupancy





Design Charrette Documents 6.7.4.0.0.0

Design Page 18



6.0.0.0.0 Design Traditional 6.7.4.0.0 Design Charrette Documents

1.0.0.0.0.0 Project
Management
Documents

2.0.0.0.0 Planning **3.0.0.0.0** Authorization/

Funding **4.0.0.0.0** Site Acquisition

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

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

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

1.1.1.0.0.0.b

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

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

OCA is available to assist. Contact the Program Coordinator to provide technical assistance, programmatic specialists, etc.

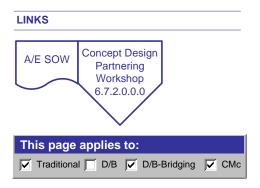


Design Excellence Peer Review 6.7.7.0.0.0



6.7.7.0.0.0 Design Excellence Peer Review

1.0.0.0.0.0 Project Management Initiate contact with OCA to A/E design team presents three Documents set up peer review preliminary concepts to the 2.0.0.0.0.0 Planning approximately 6 to 8 weeks in technical review team, Project At least three distinctly 3.0.0.0.0. Authorization/ advance of presentation different concepts will be Team and peers **Funding** submitted by the A/E team 4.0.0.0.0 Site Acquisition 5.0.0.0.0 Design/Build 6.0.0.0.0.0 Design DE Peer Review is conducted 6.7.7.0.0.0 Design on the three concepts. Peers Potential for multiple peer reviews **Excellence** provide review comments. **Peer Review** 7.0.0.0.0 Construction 8.0.0.0.0.0 Tenant Occupancy Peer review committee will The audience for this recommend development of one presentation will vary depending concept or development of a on regional requirements. The totally new concept A/E is responsible for the general incorporating portions of the presentation and for responding three concepts to any follow-up questions resulting from the presentation. Initiate contact with OCA to set up second peer review A/E will develop and present the approximately 6 to 8 weeks in final concept to the Peer Review advance of presentation Committee **OCA will recommend** the final concept



Concept
Design Review
Comments
Including Concept
Design and
VE Workshop
6.7.6.3.0.0



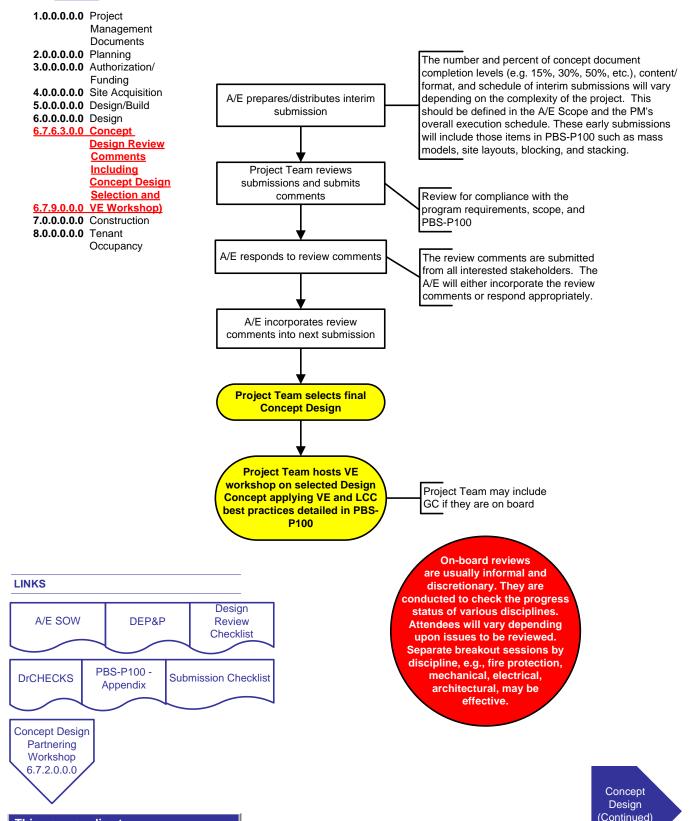
This page applies to:

▼ Traditional D/B D/B-Bridging CMc

6.0.0.0.0.0 Design Traditional

6.7.0.0.0.1.b

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





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 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

6.7.12.2.0.0 Concept

<u>Design</u>

Review

Comments (Urban

<u>Design</u>

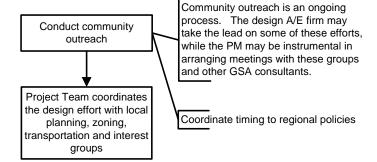
Review

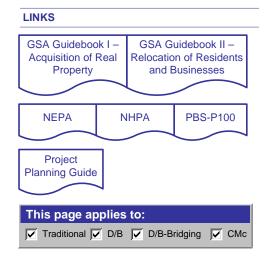
Boards)

7.0.0.0.0. Construction

8.0.0.0.0.0 Tenant

Occupancy





Final Concept Presentation to Commissioner 6.7.14.0.0.0



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 Planning

3.0.0.0.0 Authorization/

Funding

4.0.0.0.0 Site Acquisition

5.0.0.0.0 Design/Build

6.0.0.0.0. Design

6.7.14.0.0.0 Final

Concept

Presentation to the

Commissioner

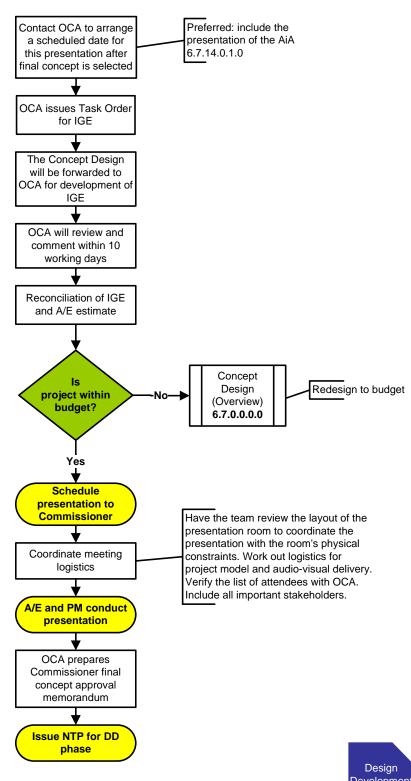
6.7.15.0.0.0 Final Concept

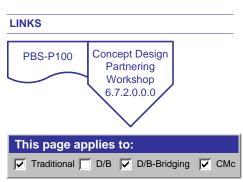
Approval

Memorandum

7.0.0.0.0 Construction 8.0.0.0.0.0 Tenant

Occupancy



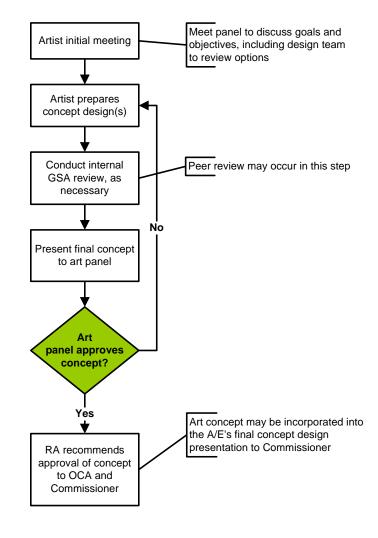


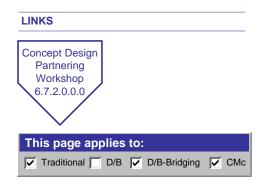


6.7.14.0.1.0 Art-in-Architecture Concept Design

1.0.0.0.0 Project
Management
Documents
2.0.0.0.0 Planning
3.0.0.0.0 Authorization/
Funding
4.0.0.0.0 Site Acquisition
5.0.0.0.0 Design/Build
6.0.0.0.0 Design
6.7.14.0.1.0 Art-inArchitecture
Concept
Design

7.0.0.0.0.0 Construction 8.0.0.0.0 Tenant Occupancy











1.0.0.0.0.0 Project

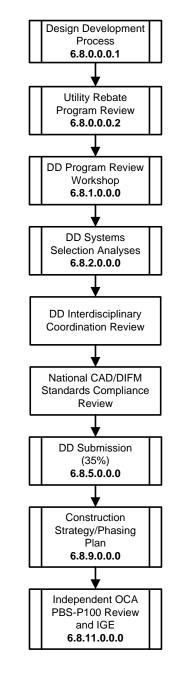
6.8.0.0.0 Design Development (Overview)

Management
Documents

2.0.0.0.0 Planning
3.0.0.0.0 Authorization/
Funding

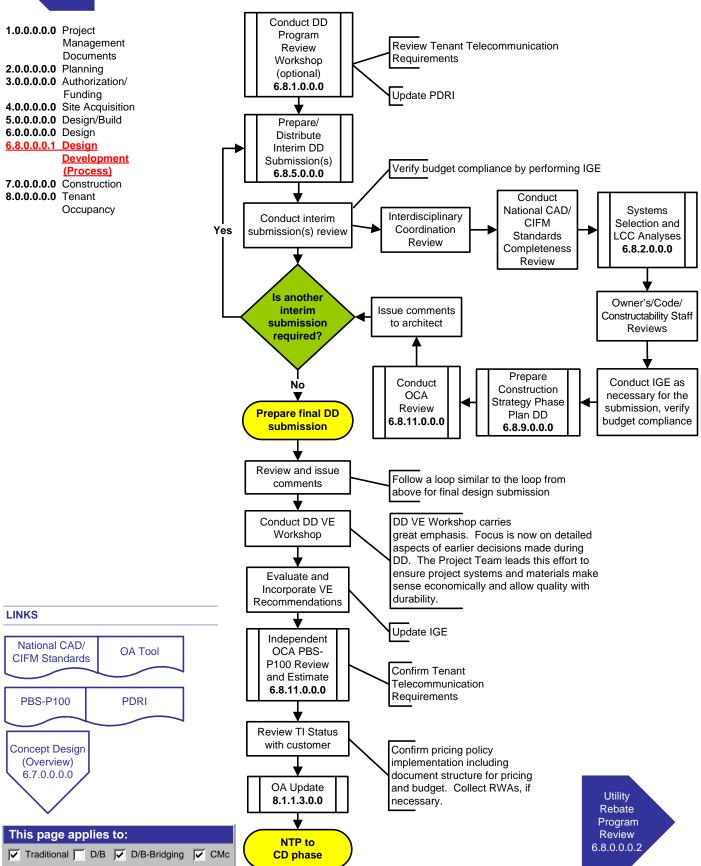
4.0.0.0.0 Site Acquisition
5.0.0.0.0 Design/Build
6.0.0.0.0 Design
6.8.0.0.0 Design
Development
(Overview)

7.0.0.0.0 Construction
8.0.0.0.0 Tenant
Occupancy





6.8.0.0.1 Design Development (Process)

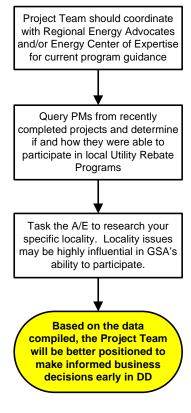


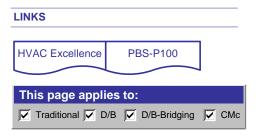


6.0.0.0.0 Design *Traditional*6.8.0.0.0.2 Utility Rebate Program Review

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
6.8.0.0.2 Utility Rebate
Program
Review
7.0.0.0.0 Construction
8.0.0.0.0 Tenant

Occupancy





DD Program Review Workshop 6.8.1.0.0.0



6.8.1.0.0.0 DD Program Review Workshop

1.0.0.0.0.0 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 DD Program
Review
Workshop

7.0.0.0.0.0 Construction **8.0.0.0.0.0** Tenant Occupancy

Project Team should review PMP, Cx Plan and status of Verify scope and budget are current programming. PMP strategy may indicate a need within the approved prospectus for the DD Workshop if certain program parameters are evident. 1.1.1.0.0.0.b Utilize the PDRI for a programmatic review. Results of the PDRI may substitute for the workshop or highlight areas in need of further development and definition. workshop needed? Yes No A/E will organize and host the DD Program Review workshop. Check A/E SOW. Outline agenda and determine the deliverables. Based on the deliverables from the workshop or tenant meetings, proceed with DDs





6.8.2.0.0.0 DD Systems Selection Analyses

1.0.0.0.0 Project

Management
Documents

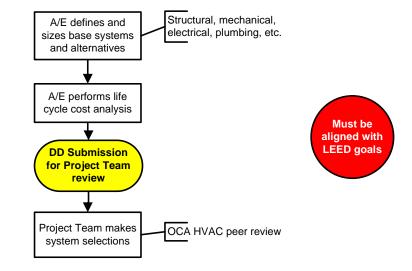
2.0.0.0.0 Planning

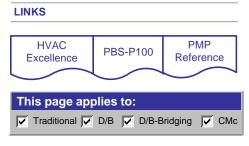
3.0.0.0.0 Authorization/
Funding

4.0.0.0.0.0 Site Acquisition
5.0.0.0.0 Design/Build
6.0.0.0.0 Design
6.8.2.0.0 DD Systems
Selection
Analyses

7.0.0.0.0 Construction
8.0.0.0.0 Tenant

Occupancy









6.0.0.0.0 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 Planning 3.0.0.0.0 Authorization/

Funding

4.0.0.0.0.0 Site Acquisition

5.0.0.0.0 Design/Build

6.0.0.0.0.0 Design

6.8.5.0.0.0 DD

Submission (35%)

7.0.0.0.0 Construction

8.0.0.0.0.0 Tenant

Occupancy

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

Process and Related Submission Requirements for both New Construction and Renovation/ Alteration projects

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

D/B and D/B-Bridging will require scope modifications from any "standard" SOWs

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

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

LINKS PBS-P100 This page applies to: ▼ Traditional ▼ D/B ▼ D/B-Bridging ▼ CMc

Construction Strategy/ Phasing Plan 6.8.9.0.0.0

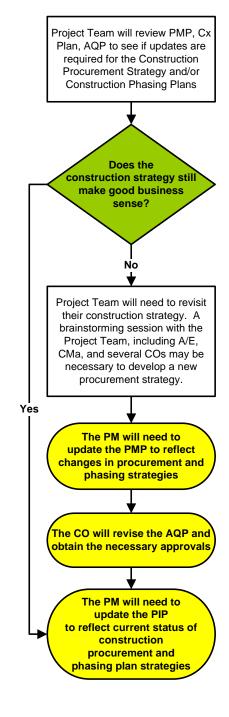


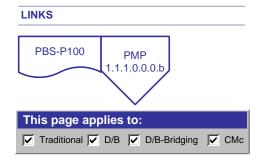


6.8.9.0.0.0 Construction Strategy/Phasing Plan

1.0.0.0.0.0 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
6.8.9.0.0 Construction
Strategy/
Phasing
Plan

7.0.0.0.0.0 Construction **8.0.0.0.0.0** Tenant Occupancy





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. 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

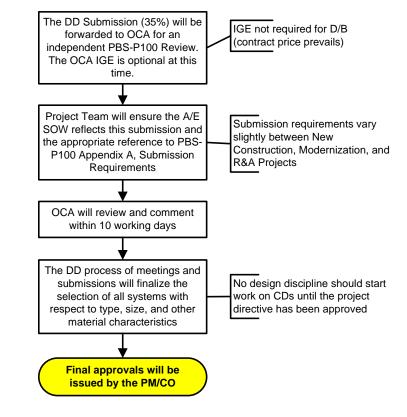
OCA PBS-P100

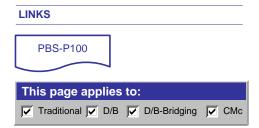
Review and **IGE Estimate**

7.0.0.0.0. Construction

8.0.0.0.0.0 Tenant

Occupancy

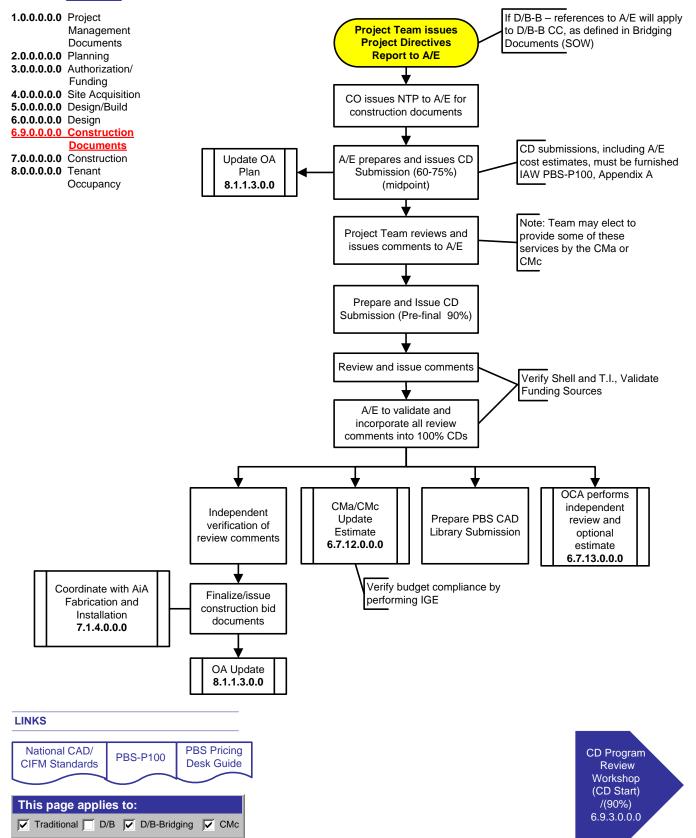






Independent OCA PBS-P100 Review and IGE 6.8.11.0.0.0

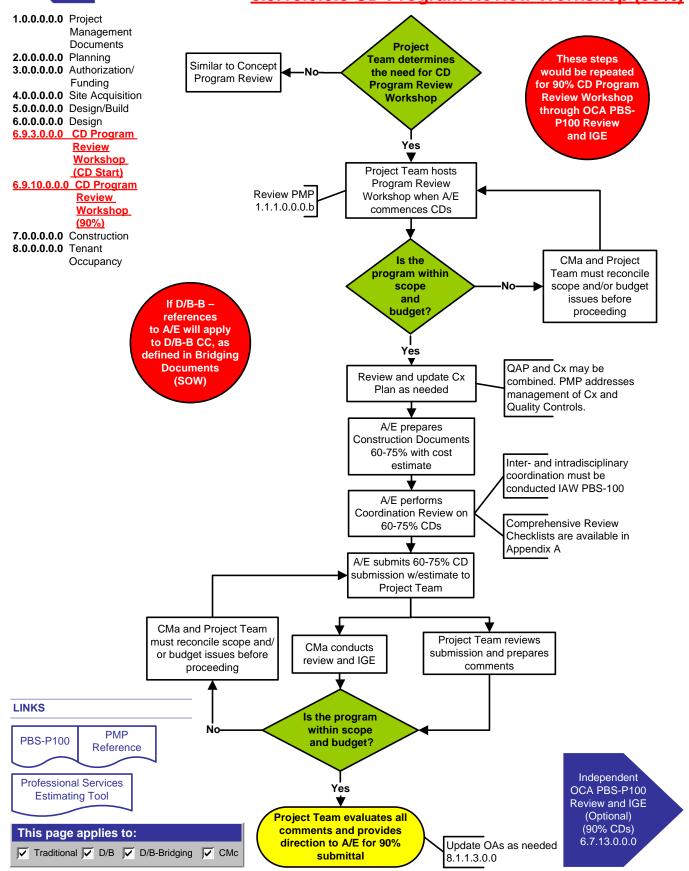
6.0.0.0.0 Design *Traditional* 6.9.0.0.0 Construction Documents



Construction Documents 6.9.0.0.0.0

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%)





6.0.0.0.0.0 Design **Traditional**

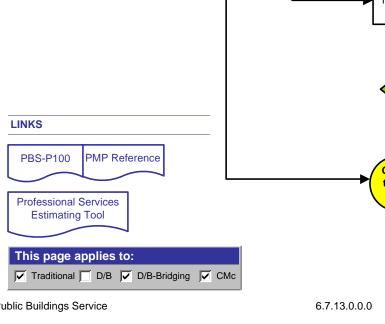
6.7.13.0.0.0 Independent OCA PBS-P100 Review and IGE (Optional) (90% CDs)

1.0.0.0.0.0 Project Management **Documents** 2.0.0.0.0.0 Planning 3.0.0.0.0. Authorization/ **Funding** 4.0.0.0.0.0 Site Acquisition 5.0.0.0.0 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. Construction 8.0.0.0.0.0 Tenant

Occupancy

CMa and Project A/E updates Team must A/E submits 90% CDs with reconcile scope checklists as needed A/E's cost estimate to and/or budget Project Team issues before proceeding Project Team ensures the Project Team submits 90% required reviews of 90% CDs and estimate to CMa CDs are conducted as for review and IGE required by PBS-P100 Νo Is the program within scope and budget? Yes Project Team submits 90% CDs to OCA for PBS-P100 Compliance Review If D/B or D/B-B - OCA IGE not OCA completes IGE Will OCA required. D/B-B contract prevails. to insure project is -Yes order IGE? within budget No OCA completes compliance review, scope review and IGE Is the program within scope and budget? Update OAs as needed 8.1.1.3.0.0 OCA provides feedback to regions for the 100% **CD** submission CMa's CD Review/ Estimate (100% CDs) 6.7.12.0.0.0





6.0.0.0.0.0 Design *Traditional*

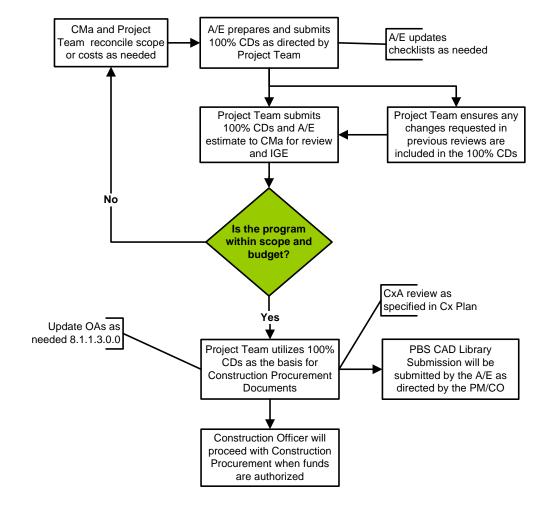
6.7.12.0.0.0 CMa's CD Review/Estimate (100% CDs)

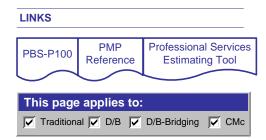
6.7.12.0.0.0 CMa's CD Review/ Estimate

6.0.0.0.0. Design

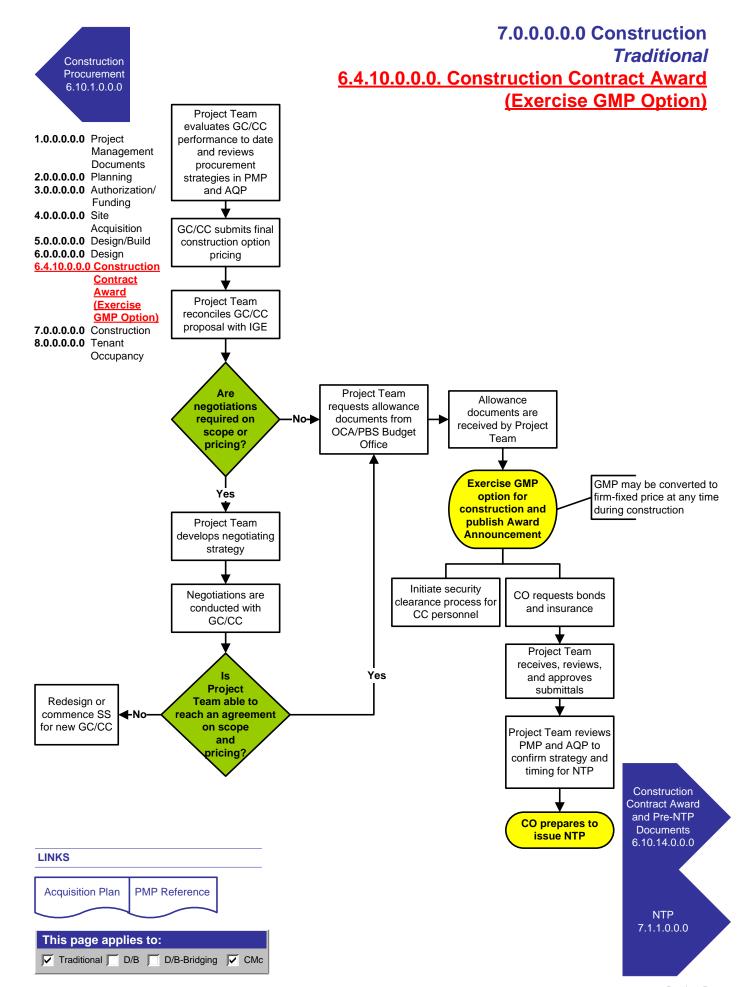
Estimate (100% CDs)
7.0.0.0.0.0 Construction

8.0.0.0.0 Tenant Occupancy











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 Planning **3.0.0.0.0** Authorization/

Funding

4.0.0.0.0.0 Site Acquisition

5.0.0.0.0 Design/Build

6.0.0.0.0.0 Design

7.0.0.0.0 Construction

6.10.14.0.0.0 Construction

Contract

<u>Award</u>

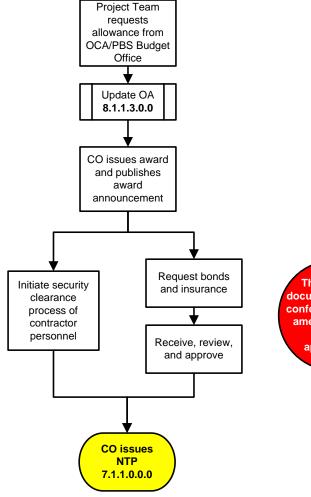
6.10.15.0.0.0 Pre-NTP

Documents (Bonds,

Insurance, Security, Etc.)

8.0.0.0.0.0 Tenant

Occupancy



The contract documents can be conformed with all amendments as deemed appropriate

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

Professional Services Task Orders 6.10.16.0.0.0





7.0.0.0.0.0 Construction *Traditional* 7.0.0.0.0 Construction

1.0.0.0.0.0 Project

Management

Documents

2.0.0.0.0 Planning **3.0.0.0.0** Authorization/

Funding

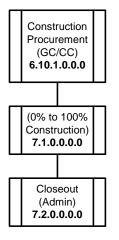
4.0.0.0.0. Site Acquisition **5.0.0.0.0.** Design/Build

6.0.0.0.0.0 Design

7.0.0.0.0 Construction

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.





7.0.0.0.0.0 Construction **Traditional** 6.10.0.0.0 Construction Procurement

1.0.0.0.0.0 Project

Management

Documents

2.0.0.0.0.0 Planning 3.0.0.0.0 Authorization/

Funding

4.0.0.0.0 Site Acquisition

5.0.0.0.0 Design/Build

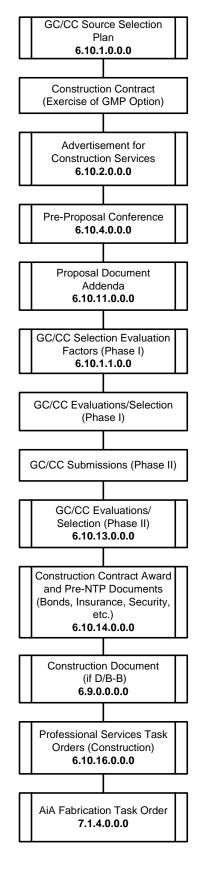
6.0.0.0.0.0 Design

7.0.0.0.0 Construction

6.10.1.0.0.0 Construction **Procurement**

8.0.0.0.0.0 Tenant

Occupancy



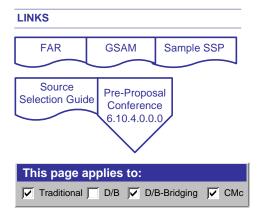
GC/CC - GC - refers to **General Contractor under the Traditional Delivery Method and CC** – refers to Construction Contractor under all other delivery methods

> GC/CC Source Selection Plan 6.10.1.0.0.0



7.0.0.0.0 Construction Traditional 6.10.1.0.0.0 GC/CC Source Selection Plan

1.0.0.0.0 Project Management Prepares/updates AQP Project Team reviews Documents as needed AQP and PMP 2.0.0.0.0.0 Planning 3.0.0.0.0. Authorization/ **Funding** Recommendations: GSA 4.0.0.0.0 Site Acquisition Establish SSEB and customer as voting 5.0.0.0.0.0 Design/Build members. A/E and CM as 6.0.0.0.0.0 Design technical advisors. 7.0.0.0.0. Construction 6.10.1.0.0.0 GC/CC Develop SSP Source Criteria **Selection** <u>Plan</u> 8.0.0.0.0.0 Tenant GC/CC Evaluation GC/CC Evaluation Occupancy Factors (Phase I) Factors (Phase II) 6.10.1.1.0.0 6.10.13.0.0.0 **Draft SSP** SSEB reviews and Review with legal Revise and resubmit SSA approves SSP counsel if necessary GC/CC - GC refers to General Is it Contractor under the approved? **Traditional Delivery** Methods and CC - refers to Construction Contractor under all Yes other delivery methods. **Issue SSP**



Advertisement for Construction Services 6.10.2.0.0.0



6.10.2.0.0.0 Advertisement for Construction Services

1.0.0.0.0.0 Project

Management

Documents

2.0.0.0.0. Planning **3.0.0.0.0.** Authorization/

Funding

4.0.0.0.0.0 Site Acquisition

5.0.0.0.0 Design/Build

6.0.0.0.0 Design

7.0.0.0.0 Construction

6.10.2.0.0.0 Advertisement

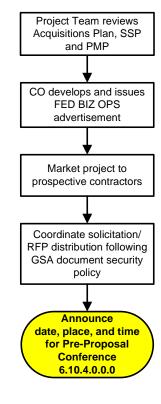
<u>for</u>

Construction

Services

8.0.0.0.0.0 Tenant

Occupancy

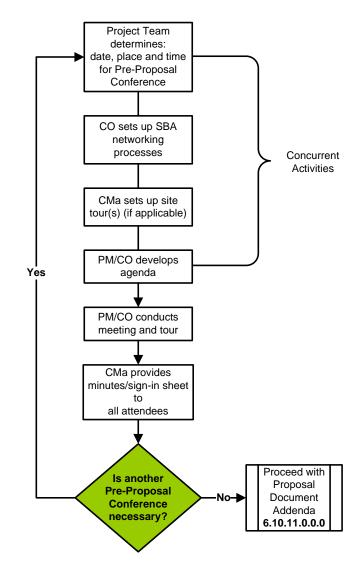


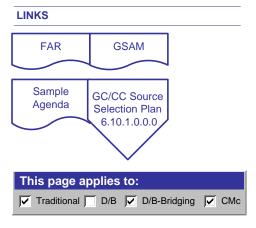


Advertisement for Construction Services 6.10.2.0.0.0

7.0.0.0.0 Construction *Traditional*6.10.4.0.0 Pre-Proposal Conference

8.0.0.0.0.0 Tenant Occupancy









7.0.0.0.0 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 Planning **3.0.0.0.0** Authorization/

Funding

4.0.0.0.0 Site Acquisition

5.0.0.0.0 Design/Build

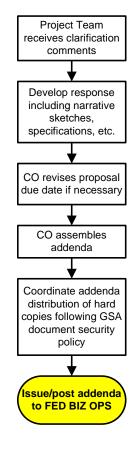
6.0.0.0.0.0 Design

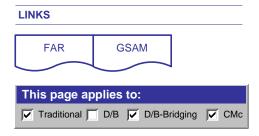
7.0.0.0.0 Construction

6.10.11.0.0.0 Proposal Document

Addenda

8.0.0.0.0.0 Tenant Occupancy





GC/CC Selection Evaluation Factors (Phase I) 6.10.1.1.0.0



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)

1.0.0.0.0 Project Management

Documents

2.0.0.0.0.0 Planning

3.0.0.0.0. Authorization/Funding

4.0.0.0.0.0 Site Acquisition

5.0.0.0.0.0 Design/Build

6.0.0.0.0. Design

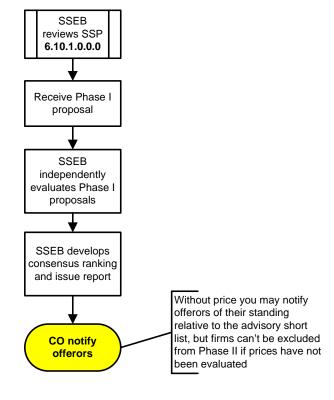
7.0.0.0.0 Construction

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





6.10.13.0.0.0 GC/CC Evaluations/Selection (Phase II)

1.0.0.0.0.0 Project

Management

Documents

2.0.0.0.0. Planning **3.0.0.0.0.** Authorization/

Funding

4.0.0.0.0. Site Acquisition

5.0.0.0.0.0 Design/Build

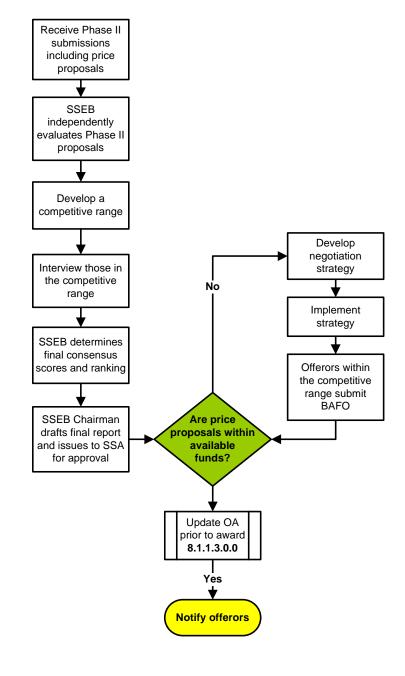
6.0.0.0.0.0 Design

7.0.0.0.0 Construction

6.10.13.0.0.0 GC/CC

Selection Evaluation Selection (Phase II)

8.0.0.0.0.0 Tenant Occupancy



This page applies to:

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

Construction
Contract Award
and Pre-NTP
Documents
6.10.14.0.0.0



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. Planning **3.0.0.0.0.** Authorization/

Funding

4.0.0.0.0.0 Site Acquisition

5.0.0.0.0. Design/Build

6.0.0.0.0 Design

7.0.0.0.0. Construction

6.10.16.0.0.0 Professional

Services Task Orders

(Construction)

8.0.0.0.0.0 Tenant Occupancy

Determine professional services needed for construction administration Examples: IH, various testing, utility services, move coordination, etc.

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





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. Design/Build

6.0.0.0.0.0 Design

7.0.0.0.0 Construction

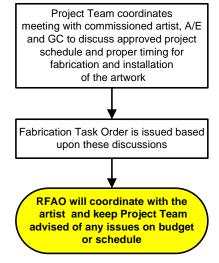
7.1.4.0.0.0 Art-in

Architecture Fabrication Task

<u>Order</u>

8.0.0.0.0.0 Tenant

Occupancy





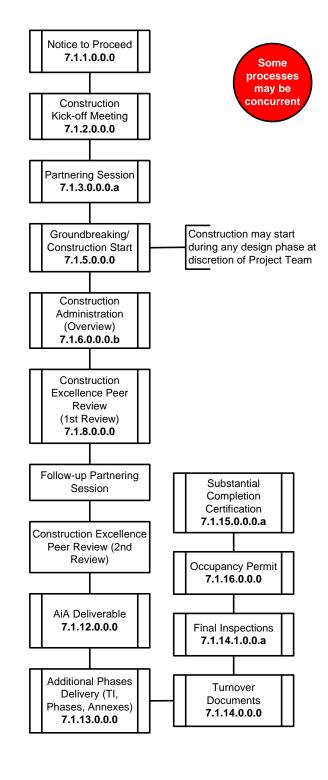




7.0.0.0.0 Construction *Traditional* 7.1.0.0.0.0 (0% to 100% Construction)

1.0.0.0.0.0 Project
 Management
 Documents
2.0.0.0.0 Planning
3.0.0.0.0 Authorization/
 Funding
4.0.0.0.0 Site Acquisition
5.0.0.0.0 Design/Build
6.0.0.0.0 Design
7.0.0.0.0 (0% to 100%
 Construction)
8.0.0.0.0 Tenant

Occupancy

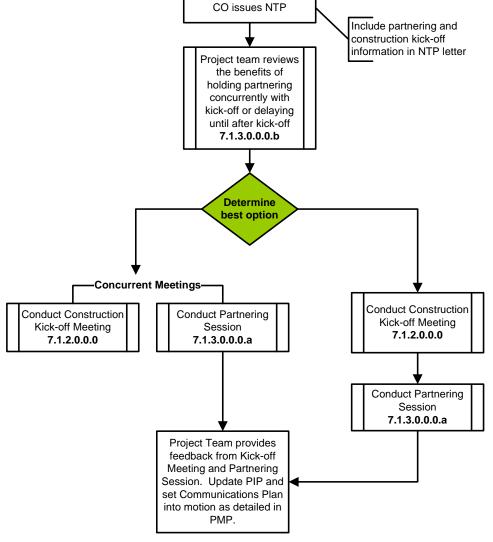


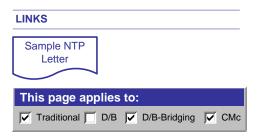






7.0.0.0.0.0 Construction *Traditional*7.1.1.0.0.0 Notice To Proceed





Construction Kick-off Meeting 7.1.2.0.0.0



7.0.0.0.0 Construction *Traditional*7.1.2.0.0.0 Construction Kick-off Meeting

1.0.0.0.0.0 Project

Management

Documents

2.0.0.0.0.0 Planning

3.0.0.0.0 Authorization/

Fundina

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 Construction

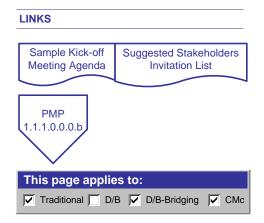
7.1.2.0.0.0 Construction

Kick-off Meeting

8.0.0.0.0.0 Tenant

Occupancy

Discuss Pros/Cons Project Team of Concurrent determines location, Kick-off and date, and time of Partnering meeting Meetings 7.1.3.0.0.0.a Invite The Project Team evolves over the life of stakeholders the project. As contractors (A/E, CMa, CMc, Cx, GC/CC) and special consultants are hired, they become part of the Project Project Team develops Team. agenda Conduct meeting Project Team assigns roles/responsibilities in the PMP. Most teams will utilize their **CMa** CMa for meeting coordination, recordation, issues meeting action plans. minutes



Partnering Session 7.1.3.0.0.0.a

Construction Kick-off Meeting 7.1.2.0.0.0

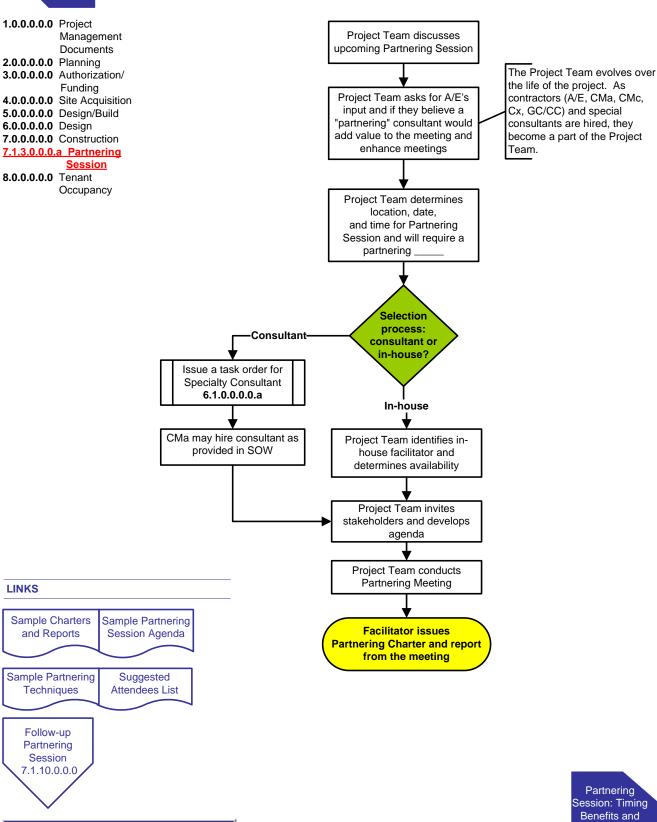
This page applies to:

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

7.0.0.0.0 Construction *Traditional*7.1.3.0.0.0 Partnering Session

Drawbacks

7.1.3.0.0.0.b





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 Authorization/

Funding

4.0.0.0.0 Site Acquisition

5.0.0.0.0. Design/Build

6.0.0.0.0.0 Design

7.0.0.0.0. Construction

7.1.3.0.0.0.b Partnering

Session: Timing

Benefits and

<u>Drawbacks</u>

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.





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 Site Acquisition

5.0.0.0.0 Design/Build

6.0.0.0.0 Design

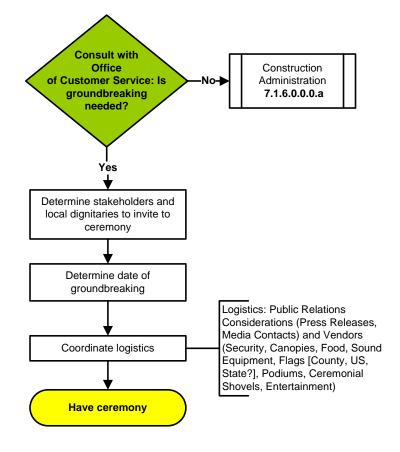
7.0.0.0.0 Construction

7.1.5.0.0.0 Groundbreaking/ Construction

<u>Start</u>

8.0.0.0.0.0 Tenant

Occupancy









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 Authorization/

Funding

4.0.0.0.0.0 Site Acquisition

5.0.0.0.0. Design/Build 6.0.0.0.0.0 Design

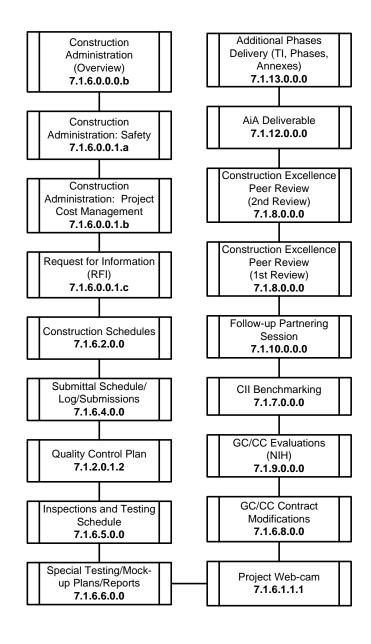
7.0.0.0.0 Construction

7.1.6.0.0.0.a Construction **Administration**

8.0.0.0.0.0 Tenant

Occupancy

Some processes may be concurrent







7.1.6.0.0.0.b Construction Administration (Overview)

1.0.0.0.0.0 Project

Management

Documents

2.0.0.0.0 Planning 3.0.0.0.0. Authorization/

Funding

4.0.0.0.0.0 Site Acquisition

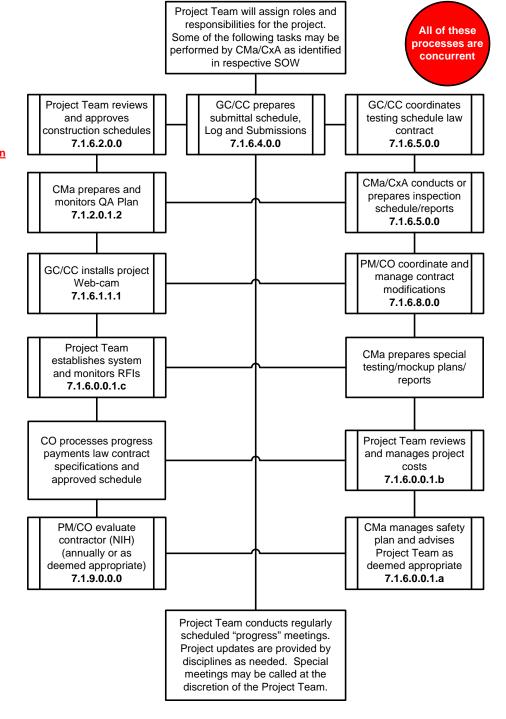
5.0.0.0.0.0 Design/Build

6.0.0.0.0.0 Design 7.0.0.0.0 Construction

7.1.6.0.0.0.b Construction **Administration**

(Overview)

8.0.0.0.0.0 Tenant Occupancy





Construction Administration: Safety 7.1.6.0.0.1.a



7.1.6.0.0.1.a Construction Administration: Safety

1.0.0.0.0. Project

Management

Documents

2.0.0.0.0.0 Planning

3.0.0.0.0 Authorization/

Funding

4.0.0.0.0.0 Site Acquisition

5.0.0.0.0 Design/Build

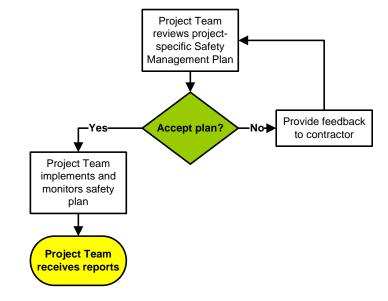
6.0.0.0.0. Design

7.0.0.0.0 Construction

7.1.6.0.0.1.a Construction
Administration:

Safety

8.0.0.0.0.0 Tenant Occupancy







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 Construction

7.1.6.0.0.1.b Construction
Administration:
Project Cost

Management
8.0.0.0.0.0 Tenant
Occupancy

Project Team reviews project budget Update project budget with additional construction information Periodically monitor and update budget based on change orders and projections Update OAs to reflect construction changes as necessary 8.1.1.3.1.0 Update PIP to reflect construction changes as necessary 1.1.3.2.0.0

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



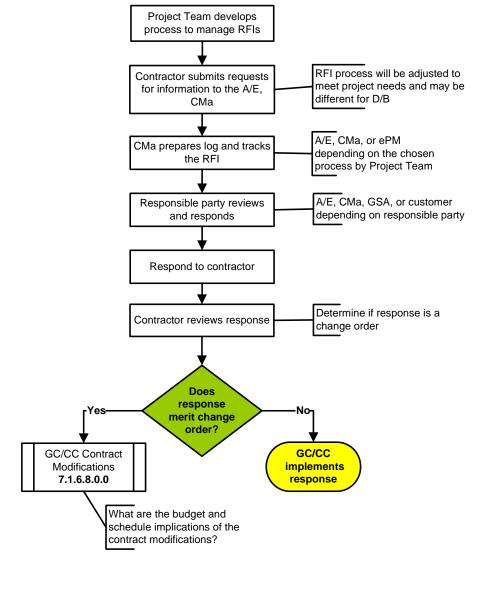


7.1.6.0.0.1.c Requests for Information (RFI)

1.0.0.0.0 Project
Management
Documents
2.0.0.0.0 Planning
3.0.0.0.0 Authorization/
Funding
4.0.0.0.0 Site Acquisition
5.0.0.0.0 Design/Build
6.0.0.0.0 Design
7.0.0.0.0 Construction
7.1.6.0.0.1.c Requests for
Information (RFI)

Occupancy

8.0.0.0.0.0 Tenant







Construction Administration 7.1.6.0.0.0.a

7.0.0.0.0 Construction *Traditional*7.1.6.2.0.0 Construction Schedules

Administration 7.1.6.0.0.0.a

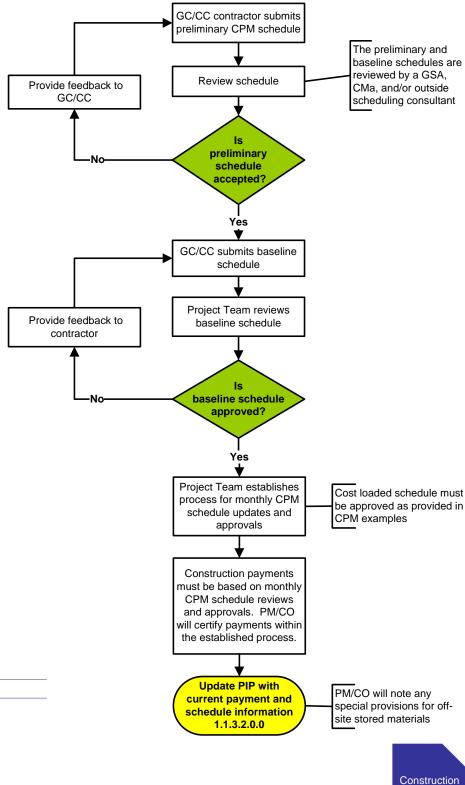
1.0.0.0.0.0 Project
Management
Documents
2.0.0.0.0 Planning
3.0.0.0.0 Authorization/
Funding
4.0.0.0.0 Site Acquisition

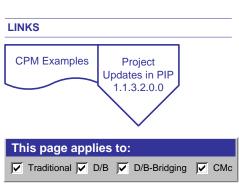
5.0.0.0.0.0 Design/Build

6.0.0.0.0. Design **7.0.0.0.0.** Construction

7.1.6.2.0.0 Construction Schedules

8.0.0.0.0.0 Tenant Occupancy





GSA - Public Buildings Service 7.1.6.2.0.0 Construction Page 22



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 Authorization/ Funding

4.0.0.0.0 Site Acquisition

5.0.0.0.0 Design/Build

6.0.0.0.0. Design

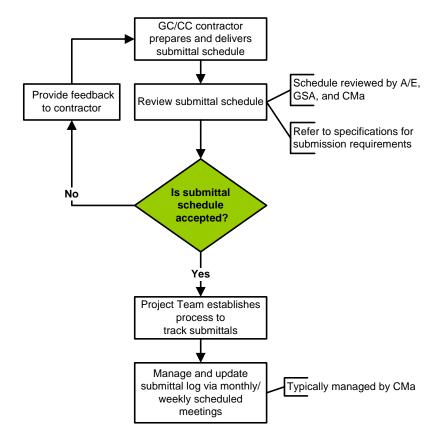
7.0.0.0.0 Construction 7.1.6.4.0.0 Submittal

Schedule/Log/

Submissions

8.0.0.0.0.0 Tenant

Occupancy



LINKS Sample Submittal Schedule This page applies to:

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





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. Planning **3.0.0.0.0.** Authorization/

Funding

4.0.0.0.0.0 Site Acquisition

5.0.0.0.0.0 Design/Build

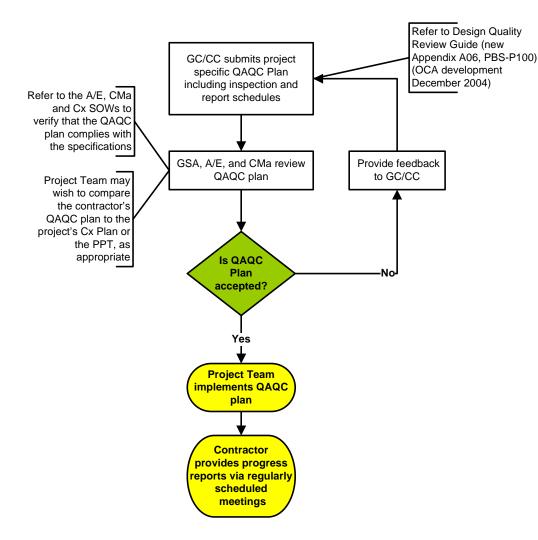
6.0.0.0.0.0 Design

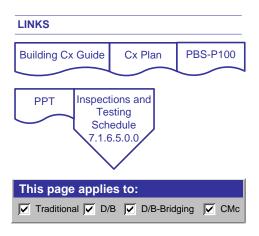
7.0.0.0.0.0 Construction

7.1.2.0.1.2 Quality

Assurance
Quality Control
Plans/Reports
(QAQC Review
Process)

8.0.0.0.0.0 Tenant Occupancy





Construction Administration 7.1.6.0.0.0.a

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 Site Acquisition

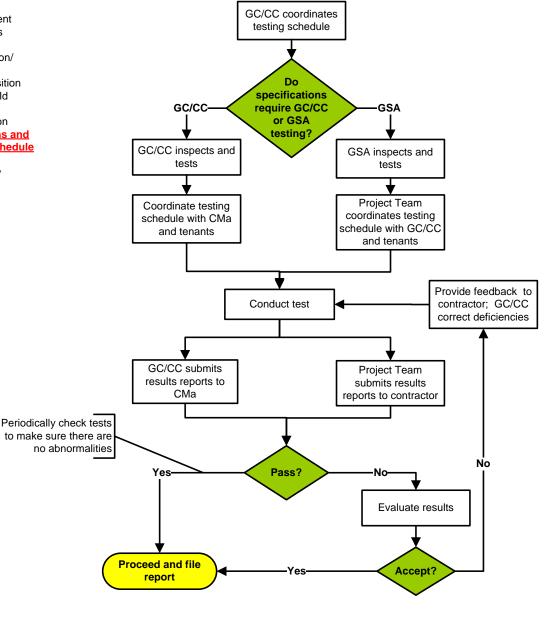
5.0.0.0.0 Design/Build

6.0.0.0.0.0 Design

7.0.0.0.0. Construction

7.1.6.5.0.0 Inspections and Testing Schedule

8.0.0.0.0.0 Tenant Occupancy





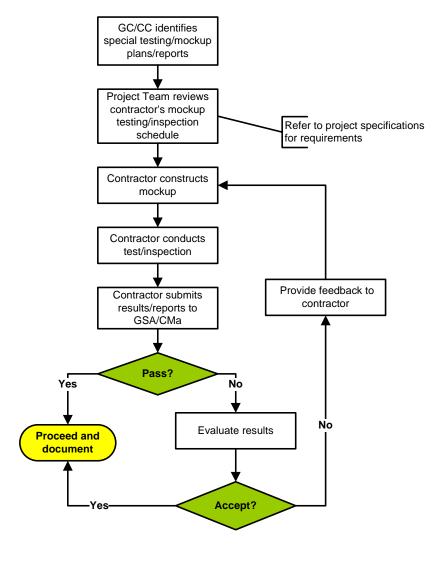
Construction Administration 7.1.6.0.0.0.a



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 Planning
3.0.0.0.0 Authorization/
Funding
4.0.0.0.0 Site Acquisition
5.0.0.0.0 Design/Build
6.0.0.0.0 Design
7.0.0.0.0 Construction
7.1.6.6.0.0 Special Testing/
Mock-up Plans/

Reports
8.0.0.0.0.0 Tenant
Occupancy









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 Planning

3.0.0.0.0 Authorization/

Funding

4.0.0.0.0 Site Acquisition 5.0.0.0.0 Design/Build

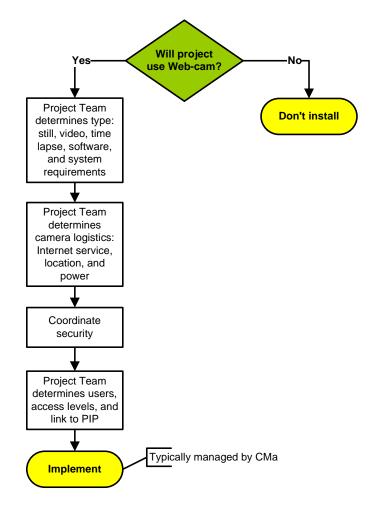
6.0.0.0.0 Design

7.0.0.0.0 Construction

7.1.6.1.1.1 Project Web-Cam

8.0.0.0.0.0 Tenant

Occupancy







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. Authorization/ Funding 4.0.0.0.0 Site Acquisition 5.0.0.0.0 Design/Build 6.0.0.0.0.0 Design **7.0.0.0.0** Construction

7.1.6.8.0.0 GC/CC Contract

Modifications 8.0.0.0.0.0 Tenant

Occupancy

LINKS

Construction

Administration

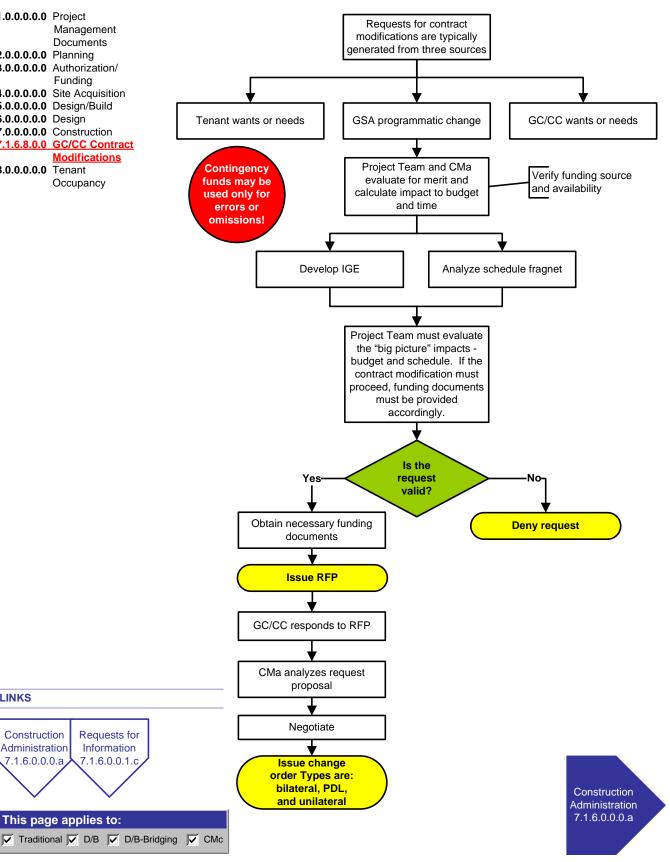
7.1.6.0.0.0.a

This page applies to:

Requests for

Information

7.1.6.0.0.1.c



Construction Page 28 GSA - Public Buildings Service 7.1.6.8.0.0



7.0.0.0.0 Construction *Traditional*7.1.9.0.0.0 GC/CC Evaluations (NIH)

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** Site Acquisition

5.0.0.0.0. Design/Build **6.0.0.0.0.** Design

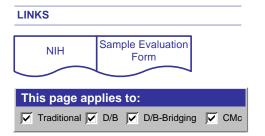
7.0.0.0.0 Construction **7.1.9.0.0.0 GC/CC**

Evaluations (NIH)

8.0.0.0.0.0 Tenant Occupancy

Evaluations of contractor past Past performance evaluations are a performance are required part of future procurement evaluations under FAR 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 All contractors should be evaluated: A/E, GC/CC, CMa, Cx, and other determine the frequency of evaluations and advise the specialty consultants if deemed appropriate Contractor(s) The PM and CO typically Go to the NIH Website and complete the evaluations complete the evaluation form

If circumstances indicate a change in the frequency of the evaluations, the Project Team may make changes as deemed appropriate



Construction Administration 7.1.6.0.0.0.a



7.1.10.0.0.0 Follow-up Partnering Session

8.0.0.0.0.0 Tenant

Session

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.

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

Project Team discusses

need for a follow-up

Partnering Session

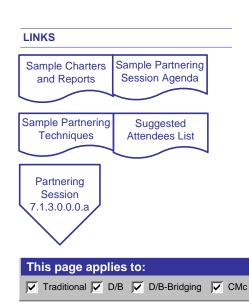
Plan Partnering
Session

Plan Partnering
Session

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

Selection

Process: consultant or in-house?



Issue a Task Order for Specialty Consultant In-house Facilitator 6.1.0.0.0.0.a Project Team identifies inor house facilitator and determines availability CMa may hire consultant as provided in SOW Project Team invites stakeholders and develops agenda Project Team conducts Partnering Meeting **Facilitator highlights** original Partnering Charter and prepares reports from 2nd meeting

(0% to 100% Construction) 7.1.0.0.0.0

-Consultant



7.0.0.0.0.0 Construction *Traditional*7.1.7.0.0.0 Cll Benchmarking

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 Site Acquisition

5.0.0.0.0.0 Design/Build

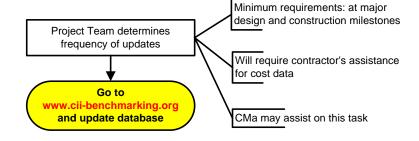
6.0.0.0.0 Design

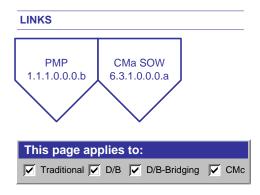
7.0.0.0.0 Construction

7.1.7.0.0.0 CII Benchmarking

8.0.0.0.0.0 Tenant

Occupancy



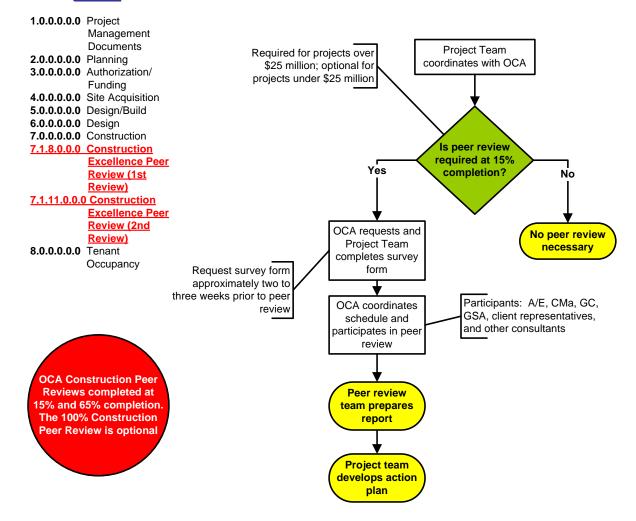


Construction Administration 7.1.6.0.0.0.a

(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)









7.0.0.0.0 Construction *Traditional*7.1.12.0.0.0 Art-In-Architecture Deliverable

1.0.0.0.0 Project
Management
Documents
2.0.0.0.0 Planning

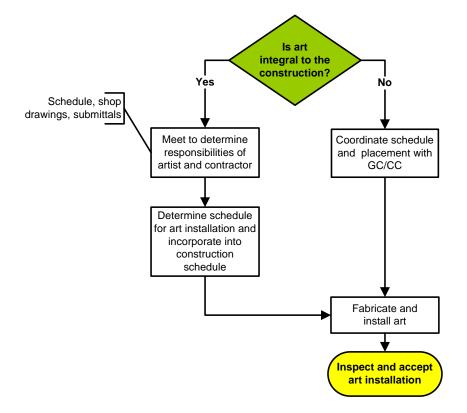
3.0.0.0.0 Authorization/ Funding

4.0.0.0.0.0 Site Acquisition **5.0.0.0.0.0** Design/Build **6.0.0.0.0.0** Design

7.0.0.0.0.0 Design **7.0.0.0.0.0.0** Construction **7.1.12.0.0.0** Art-in-

Architecture Deliverable

8.0.0.0.0.0 Tenant Occupancy



AiA Fabrication Design Task Order 7.1.4.0.0.0 This page applies to: Traditional D/B D/B-Bridging CMc





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. Authorization/ Funding

4.0.0.0.0. Site Acquisition

5.0.0.0.0.0 Design/Build

6.0.0.0.0 Design

7.0.0.0.0. Construction

7.1.13.0.0.0 Additional

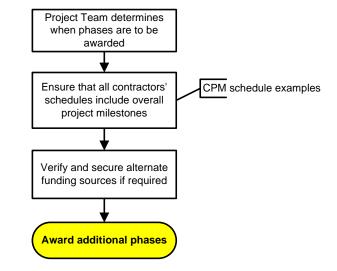
Phases
Delivery (TI,

Phases, Annexes)

8.0.0.0.0.0 Tenant

o.u.u.u.u renant

Occupancy









7.0.0.0.0 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

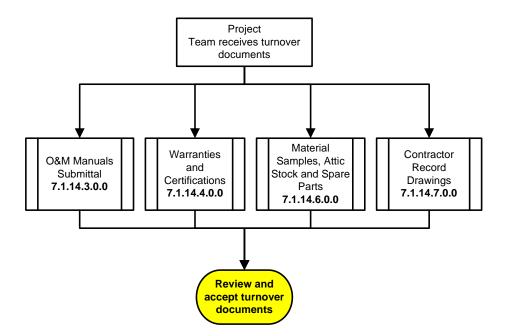
3.0.0.0.0 Authorization/ Funding

4.0.0.0.0 Site Acquisition 5.0.0.0.0 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

8.0.0.0.0.0 Tenant Occupancy







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 Authorization/ Funding

4.0.0.0.0 Site Acquisition 5.0.0.0.0.0 Design/Build 6.0.0.0.0.0 Design 7.0.0.0.0. Construction 7.1.14.3.0.0 O&M Manuals

Submittal

8.0.0.0.0.0 Tenant Occupancy

LINKS

Cx Plan

Substantial

Completion

Certificate: Final

Completion

7.1.15.0.0.0.c

This page applies to:

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

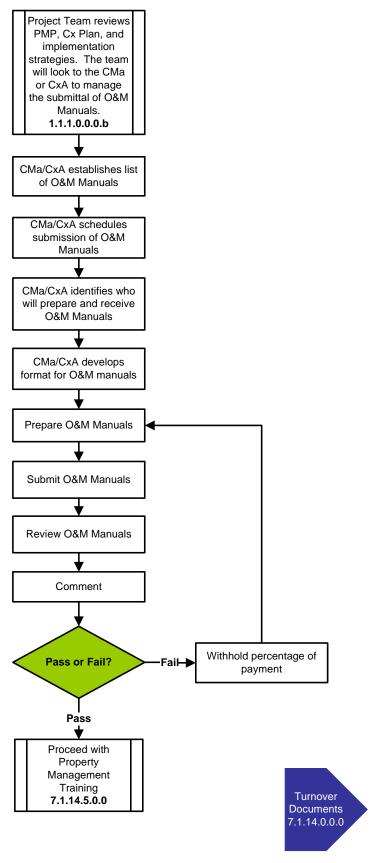
Substantial

Completion Certification 7.1.15.0.0.0.a

Occupancy

Permit

7.1.16.0.0.0





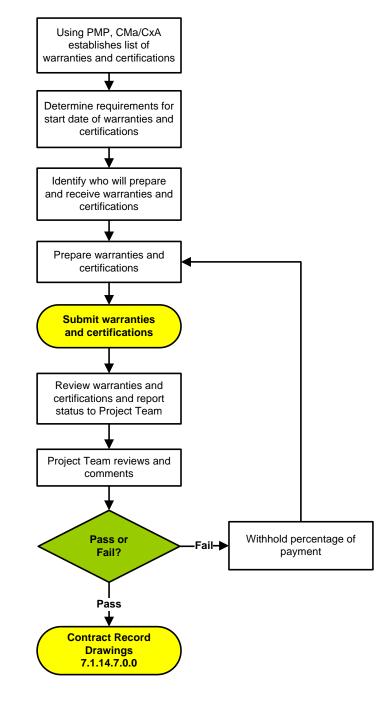
7.1.14.4.0.0 Warranties and Certifications

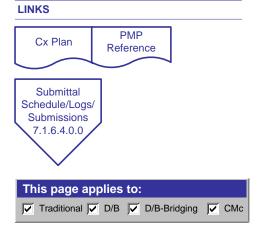
1.0.0.0.0.0 Project
Management
Documents
2.0.0.0.0 Planning
3.0.0.0.0 Authorization/
Funding
4.0.0.0.0 Site Acquisition
5.0.0.0.0 Design/Build

7.0.0.0.0 Construction
7.1.14.4.0.0 Warranties and
Certifications

8.0.0.0.0.0 Tenant Occupancy

6.0.0.0.0.0 Design





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 Project
Management

Documents

2.0.0.0.0 Planning

3.0.0.0.0.0 Authorization/

Funding

4.0.0.0.0.0 Site Acquisition

5.0.0.0.0 Design/Build

6.0.0.0.0. Design

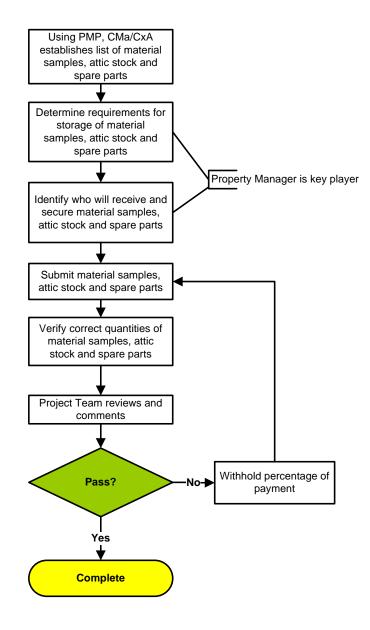
7.0.0.0.0 Construction

7.1.14.6.0.0 Material

Samples,
Attic Stock and
Spare Parts

8.0.0.0.0.0 Tenant

Occupancy



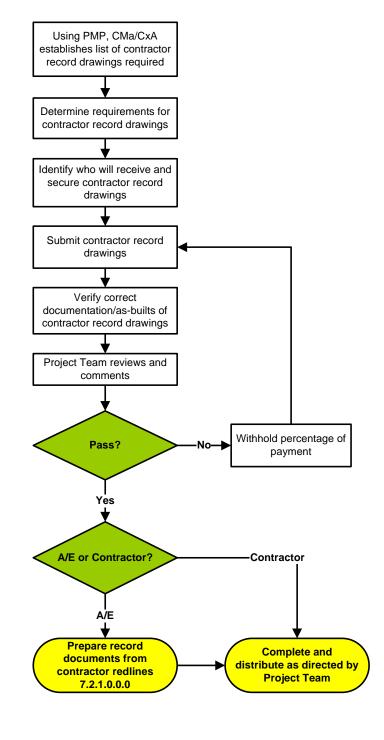
This page applies to: Traditional D/B D/B-Bridging CMc

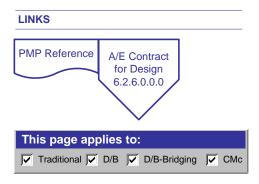




7.0.0.0.0 Construction *Traditional*7.1.14.7.0.0 Contractor Record Drawings

Occupancy

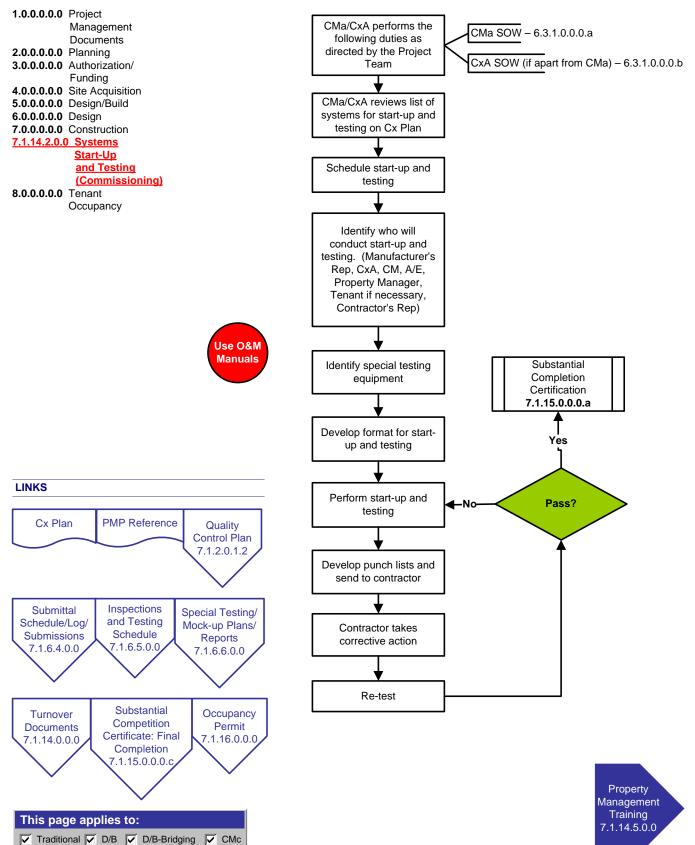




Turnover Documents 7.1.14.0.0.0



7.1.14.2.0.0 Systems Start-Up and Testing (Commissioning)



GSA - Public Buildings Service 7.1.14.2.0.0 Construction Page 40

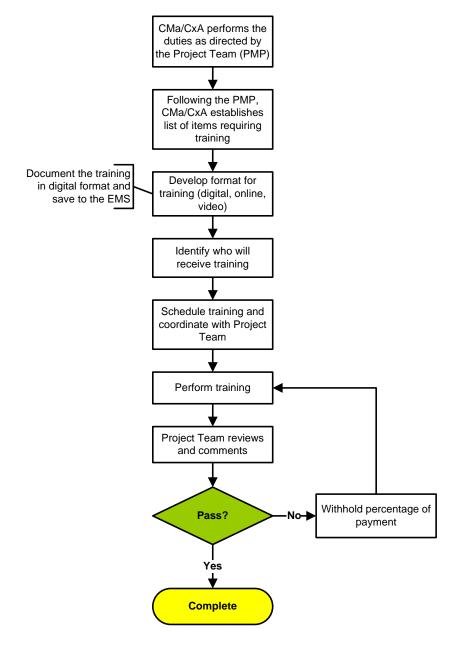


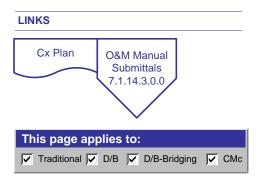
7.1.14.5.0.0 Property Management Training

1.0.0.0.0.0 Project
Management
Documents
2.0.0.0.0 Planning
3.0.0.0.0 Authorization/
Funding
4.0.0.0.0 Site Acquisition
5.0.0.0.0 Design/Build
6.0.0.0.0 Design
7.0.0.0.0 Construction
7.1.14.5.0.0 Property
Management
Training

8.0.0.0.0.0 Tenant

Occupancy





Turnover Documents 7.1.14.0.0.0



7.1.15.0.0.0.a Substantial Completion Certification

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 Design/Build

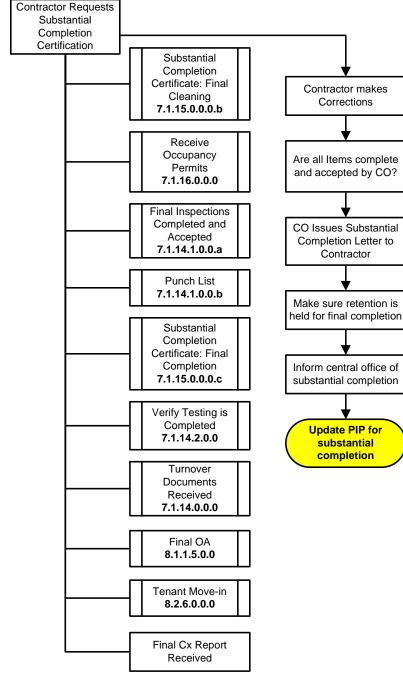
6.0.0.0.0.0 Design

7.0.0.0.0 Construction

7.1.15.0.0.0.a Substantial Completion

Certification

8.0.0.0.0.0 Tenant Occupancy



Carry Company Company

Closeout (Admin) 7.2.0.0.0.0



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

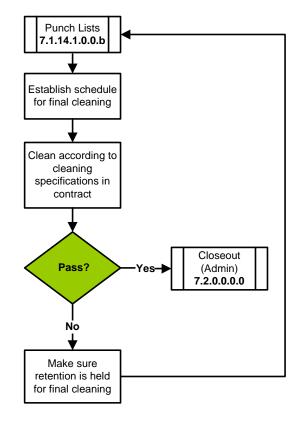
4.0.0.0.0.0 Site Acquisition **5.0.0.0.0.0** Design/Build

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







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

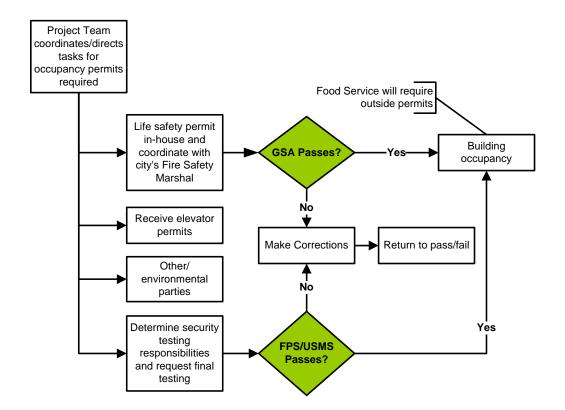
2.0.0.0.0.0 Planning **3.0.0.0.0.0** Authorization/ Funding

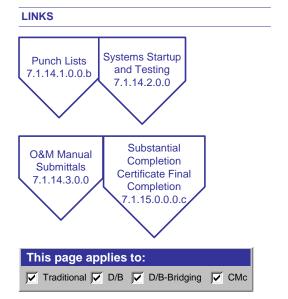
4.0.0.0.0.0 Site Acquisition **5.0.0.0.0.0** Design/Build **6.0.0.0.0.0** Design

7.0.0.0.0 Construction **7.1.16.0.0.0** Occupancy

Permit 8.0.0.0.0.0 Tenant

3.0.0.0.0.0 Tenant Occupancy









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 Planning **3.0.0.0.0** Authorization/

Funding

4.0.0.0.0 Site Acquisition

5.0.0.0.0 Design/Build

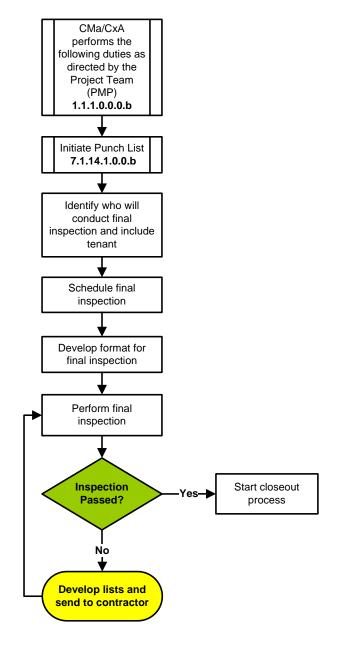
6.0.0.0.0.0 Design

7.0.0.0.0 Construction

7.1.14.1.0.0.a Final

Inspections

8.0.0.0.0.0 Tenant Occupancy



EINKS 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



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** Planning

3.0.0.0.0.0 Authorization/

Funding

4.0.0.0.0.0 Site Acquisition

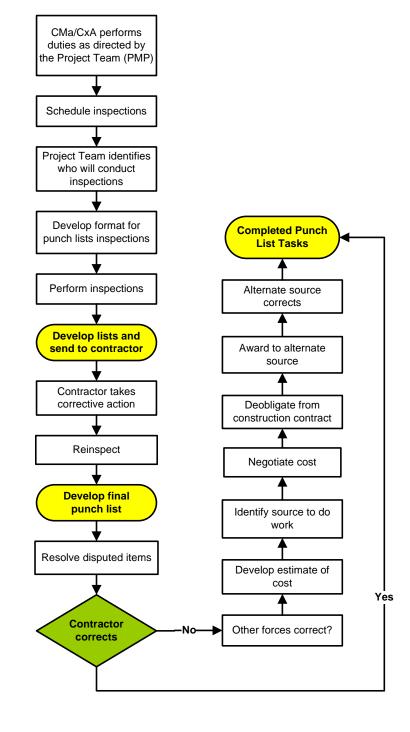
5.0.0.0.0.0 Design/Build

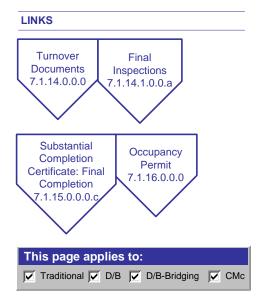
6.0.0.0.0.0 Design

7.0.0.0.0 Construction

7.1.14.1.0.0.b Punch Lists 8.0.0.0.0.0 Tenant

Occupancy







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 Authorization/

Funding

4.0.0.0.0.0 Site Acquisition 5.0.0.0.0 Design/Build

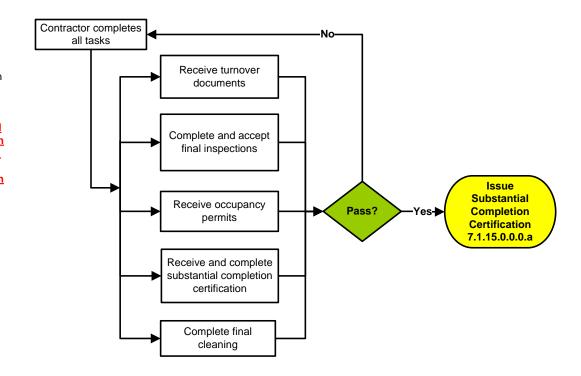
6.0.0.0.0.0 Design

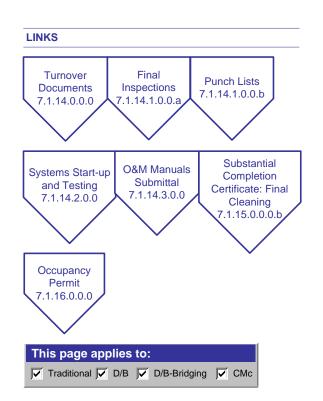
7.0.0.0.0 Construction

7.1.15.0.0.0.c Substantial Completion

Certificate: <u>Final</u> Completion

8.0.0.0.0.0 Tenant Occupancy







7.0.0.0.0 Construction Traditional 7.2.0.0.0 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 Design/Build

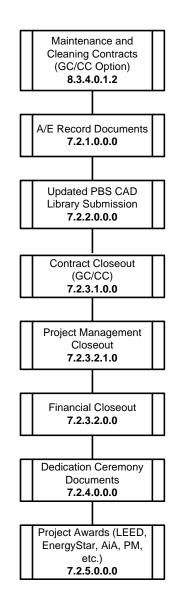
6.0.0.0.0.0 Design

7.0.0.0.0 Construction

7.2.0.0.0.0 Closeout (Admin)

8.0.0.0.0.0 Tenant

Occupancy



Some processes may be concurrent

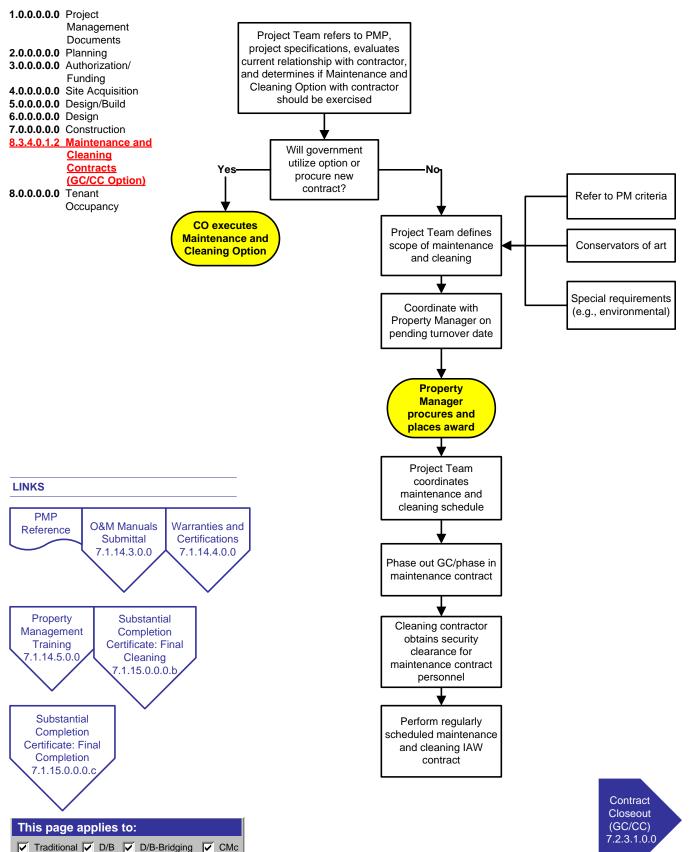
Project Team
must ensure all punch
list items are completed,
all contractor cleaning is
completed, system testing
is completed, and staff
training has been
conducted before
proceeding to
Closeout







8.3.4.0.1.2 Maintenance and Cleaning Contracts (GC/CC Option)





7.0.0.0.0 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 Planning **3.0.0.0.0** Authorization/

Funding

4.0.0.0.0.0 Site Acquisition

5.0.0.0.0 Design/Build

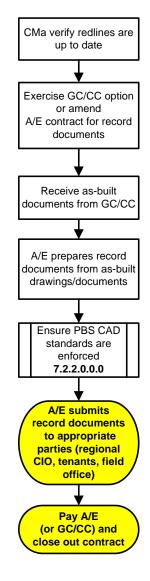
6.0.0.0.0 Design

7.0.0.0.0 Construction

7.2.1.0.0.0 A/E Record

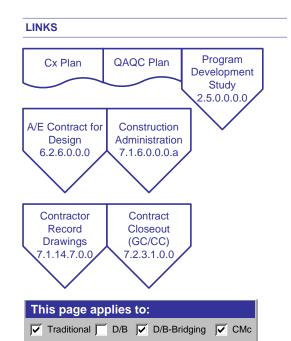
Documents

8.0.0.0.0.0 Tenant Occupancy



Cx Plan establishes quality control for verification of as-builts

QAQC should also address A/E Record Documents



Closeout (Admin) 7.2.0.0.0.0



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 Authorization/

Funding

4.0.0.0.0. Site Acquisition

5.0.0.0.0 Design/Build

6.0.0.0.0.0 Design

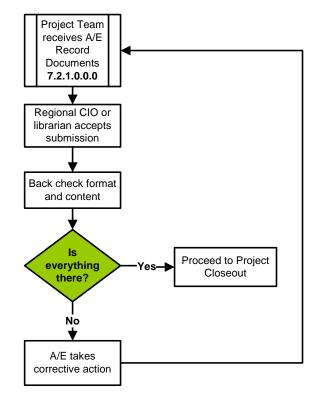
7.0.0.0.0. Construction

7.2.2.0.0.0 Updated PBS CAD

Library

Submission 8.0.0.0.0.0 Tenant

Occupancy



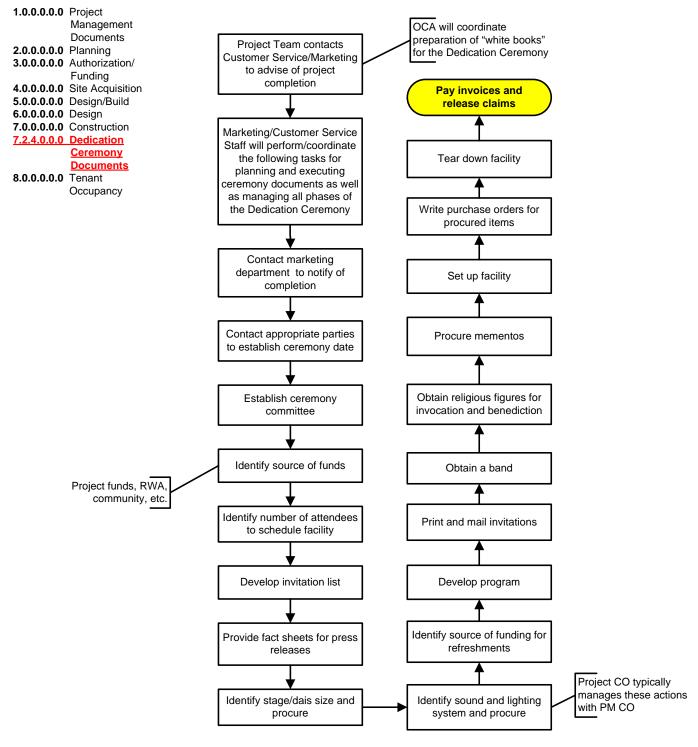
QAQC should address CAD Library submissions







7.2.4.0.0.0 Dedication Ceremony Documents







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. Authorization/

Funding

4.0.0.0.0. Site Acquisition

5.0.0.0.0 Design/Build

6.0.0.0.0.0 Design

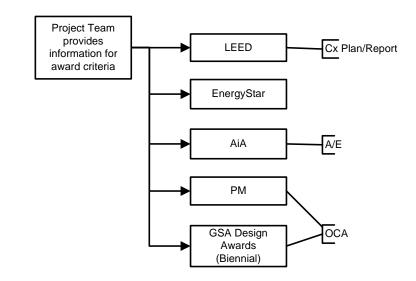
7.0.0.0.0 Construction

7.2.5.0.0.0 Project Awards

(LEED. EnergyStar,

AiA, PM, etc.)
8.0.0.0.0.0 Tenant

Occupancy









7.0.0.0.0 Construction *Traditional*7.2.3.1.0.0 Contract Closeout (GC/CC)

1.0.0.0.0.0 Project

Management

Project Team

verifies

Substantial

Completion

Certificate:

Final

Cleaning

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

6.0.0.0.0.0 Design **7.0.0.0.0.0** Construction

7.2.3.1.0.0 Contract

Closeout (GC/CC)

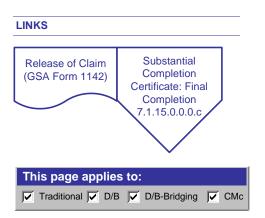
8.0.0.0.0.0 Tenant Occupancy

Compete final cleaning

Verify completion of contract(s)

CMa submits final report

CMa submits final report



Closeout (Admin) 7.2.0.0.0.0

CO receives final

invoice and Release

of Claims (GSA

Form 1142)

Yes-

No

Identify scope of claim

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



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 Authorization/

Funding

4.0.0.0.0 Site Acquisition

5.0.0.0.0 Design/Build

6.0.0.0.0 Design

7.0.0.0.0 Construction

7.2.3.2.1.0 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

Some of these processes tasks are concurrent

Develop lessons learned

following tasks for PM

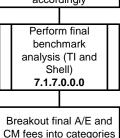
closeout

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

CM fees into categories of the professional services estimating tool





Professional Services GC/CC **Estimating Tool Evaluations** 7.1.9.0.0.0

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

(NIH)

Closeout (Admin) 7.2.0.0.0.0



7.0.0.0.0.0 Construction Traditional 7.2.3.2.0.0 Financial Closeout

1.0.0.0.0.0 Project Management

Documents

2.0.0.0.0 Planning 3.0.0.0.0 Authorization/ Funding

4.0.0.0.0.0 Site Acquisition

5.0.0.0.0 Design/Build

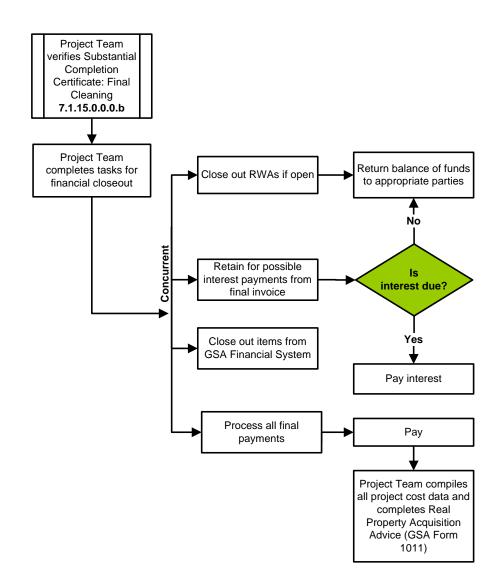
6.0.0.0.0.0 Design

7.0.0.0.0 Construction

7.2.3.2.0.0 Financial **Closeout**

8.0.0.0.0.0 Tenant

Occupancy





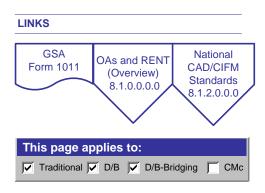
Real Property Acquisition Advice (GSA Form 1011) 8.1.3.0.1.0



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

(GSA Form 1011)





Financial Closeout 7.2.3.2.0.0



8.0.0.0.0.0 Tenant Occupancy *Traditional*8.0.0.0.0.0 Tenant Occupancy

1.0.0.0.0. Project

Management

Documents

2.0.0.0.0. Planning

3.0.0.0.0. Authorization/

Funding

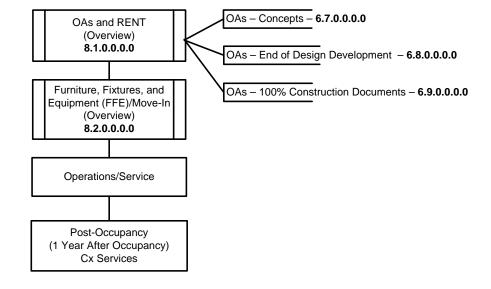
4.0.0.0.0.0 Site Acquisition

5.0.0.0.0. Design/Build **6.0.0.0.0.** Design

7.0.0.0.0 Construction

8.0.0.0.0. Tenant

Occupancy

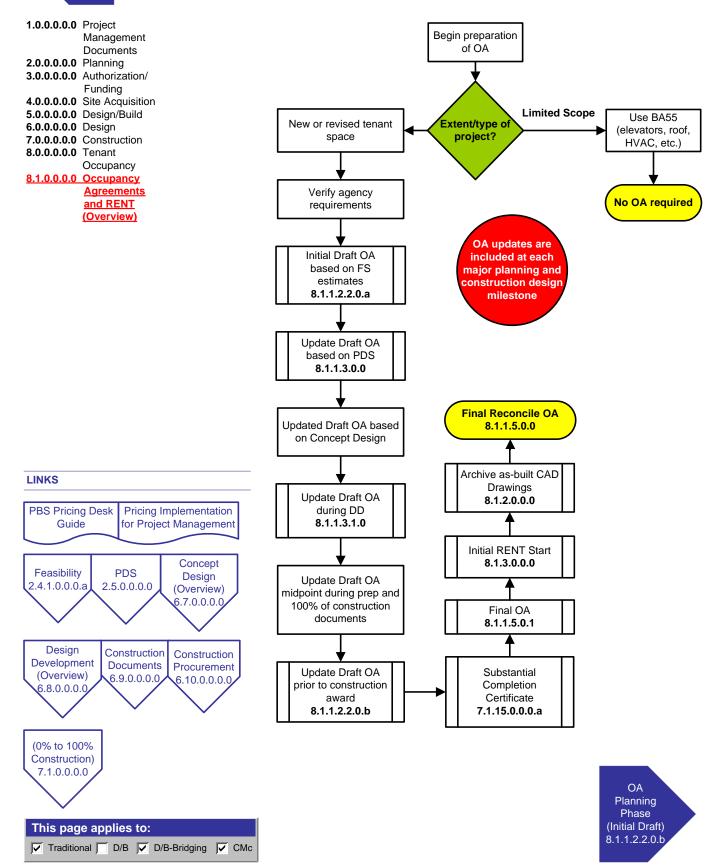






8.0.0.0.0.0 Tenant Occupancy Traditional

8.1.0.0.0 Occupancy Agreements and RENT (Overview)





8.0.0.0.0. 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 Authorization/

Funding

4.0.0.0.0 Site Acquisition

5.0.0.0.0 Design/Build

6.0.0.0.0. Design

7.0.0.0.0 Construction

8.0.0.0.0.0 Tenant

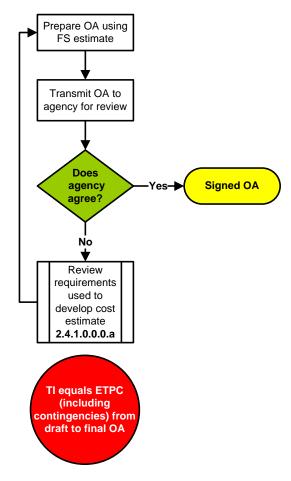
Occupancy

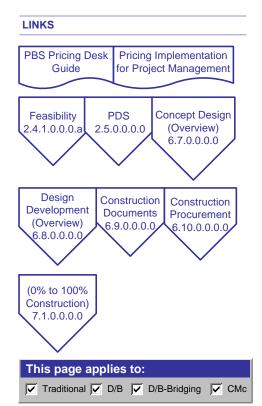
8.1.1.2.2.0.a Occupancy

<u>Agreement</u> **Planning**

Phase Phase

(Initial Draft)







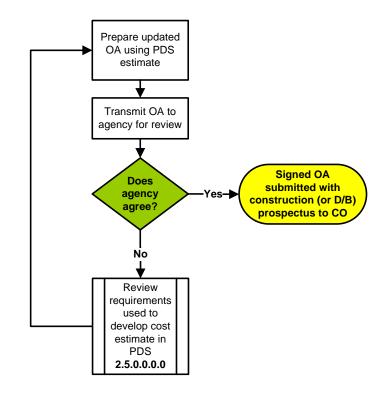


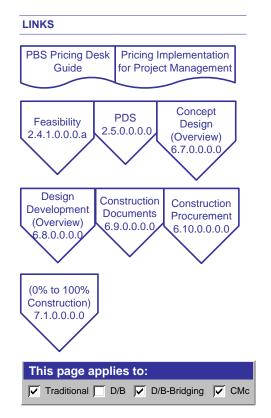
8.0.0.0.0 Tenant Occupancy Traditional

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

1.0.0.0.0.0 Project Management Documents 2.0.0.0.0 Planning 3.0.0.0.0. Authorization/ Funding 4.0.0.0.0.0 Site Acquisition 5.0.0.0.0.0 Design/Build 6.0.0.0.0.0 Design 7.0.0.0.0 Construction 8.0.0.0.0.0 Tenant Occupancy 8.1.1.3.0.0 Occupancy **Agreement** based on PDS-(Proposed

Draft)/Updates





Construction Authorization (Prospectus) 3.4.0.0.0.0

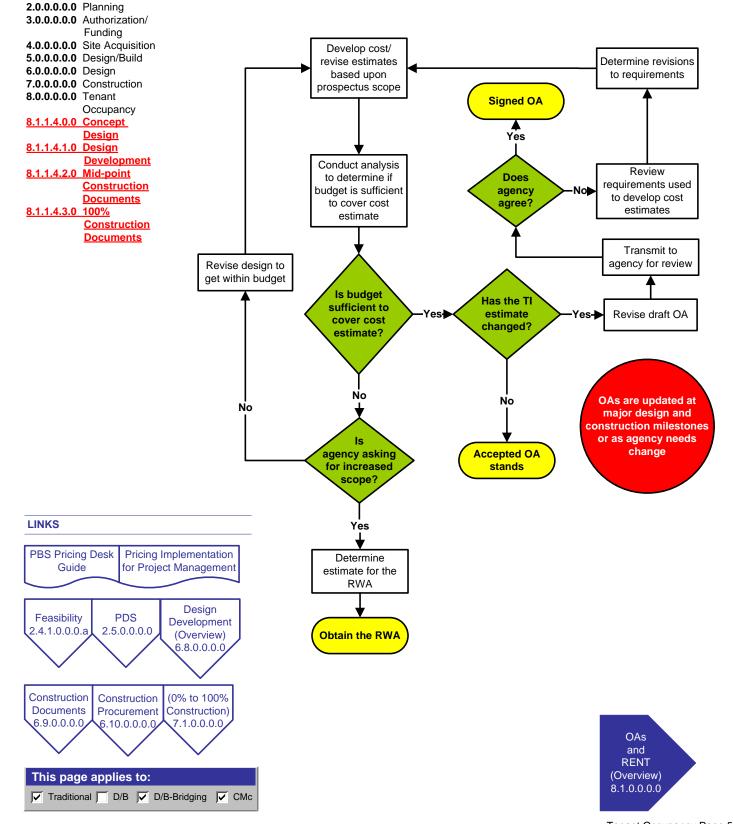
OAs and **RENT** (Overview) 8.1.0.0.0.0

8.0.0.0.0 Tenant Occupancy **Traditional**

8.1.1.4.0.0 Concept Design 8.1.1.4.1.0 Design Development

8.1.1.4.3.0 100% Construction Documents

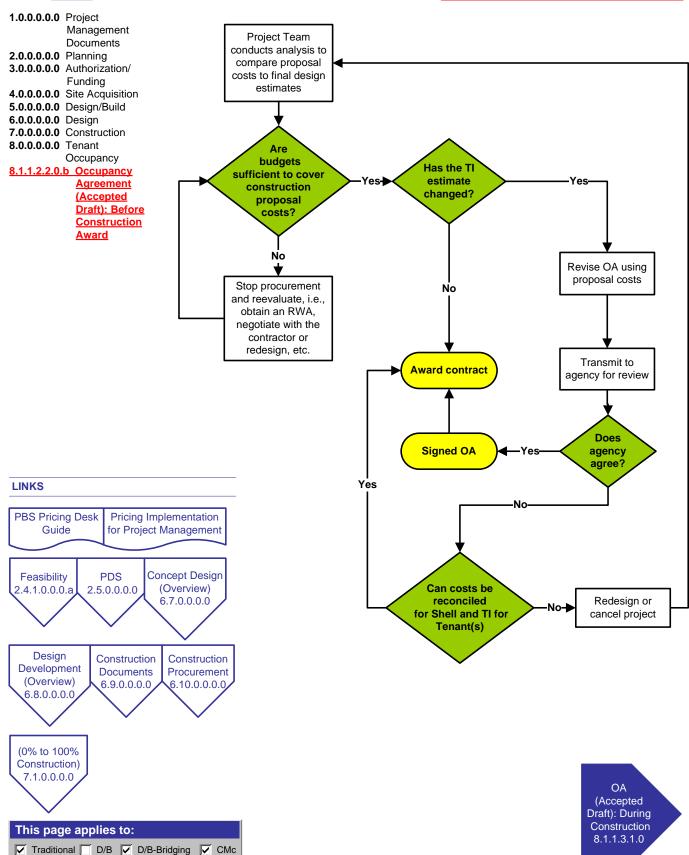
8.1.1.4.2.0 Mid-Point Construction Documents 1.0.0.0.0.0 Project Management Documents





8.0.0.0.0 Tenant Occupancy Traditional

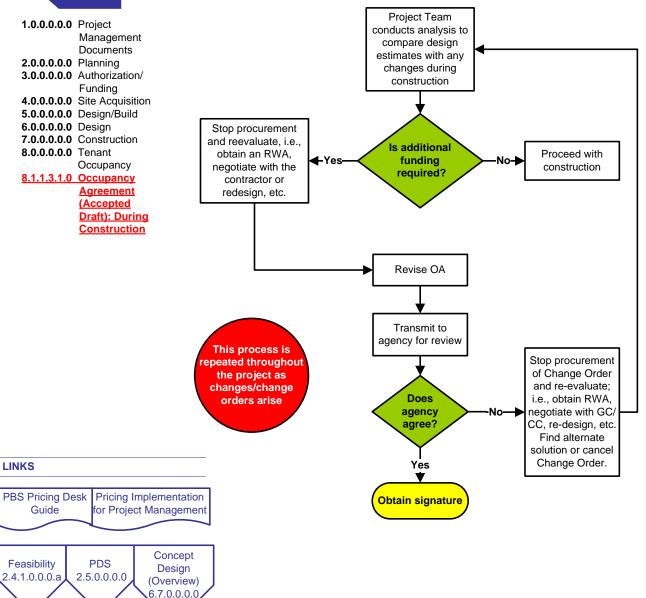
8.1.1.2.2.0.b Occupancy Agreement (Accepted Draft): Before Construction Award

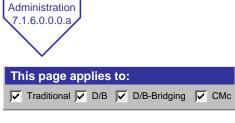


OA (Accepted Draft): Before Construction Award 8.1.1.2.2.0.b

8.0.0.0.0.0 Tenant Occupancy Traditional

8.1.1.3.1.0 Occupancy Agreement (Accepted Draft): During Construction





Construction

Documents

6.9.0.0.0.0

(0% to 100%

Construction)

7.1.0.0.0.0

Design

Development

(Overview)

6.8.0.0.0.0

Construction

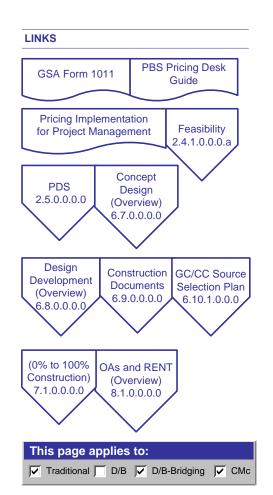


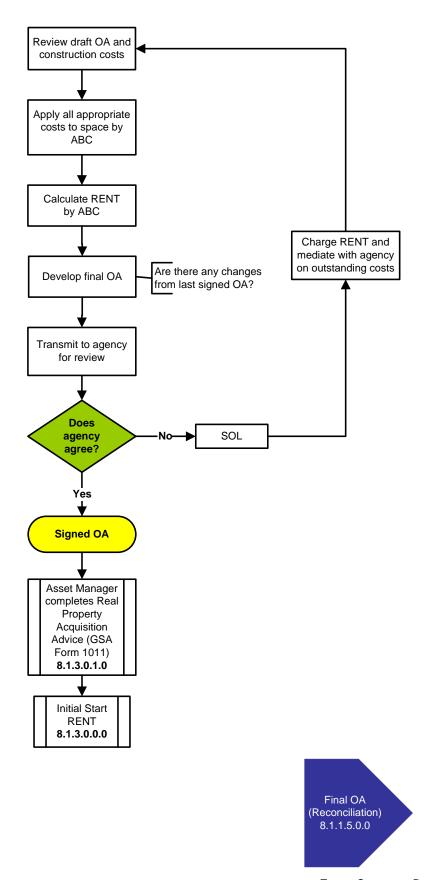
OA (Accepted Draft): During Construction 8.1.1.3.1.0

8.0.0.0.0.0 Tenant Occupancy *Traditional*8.1.1.5.0.1 Final Occupancy Agreement

Occupancy

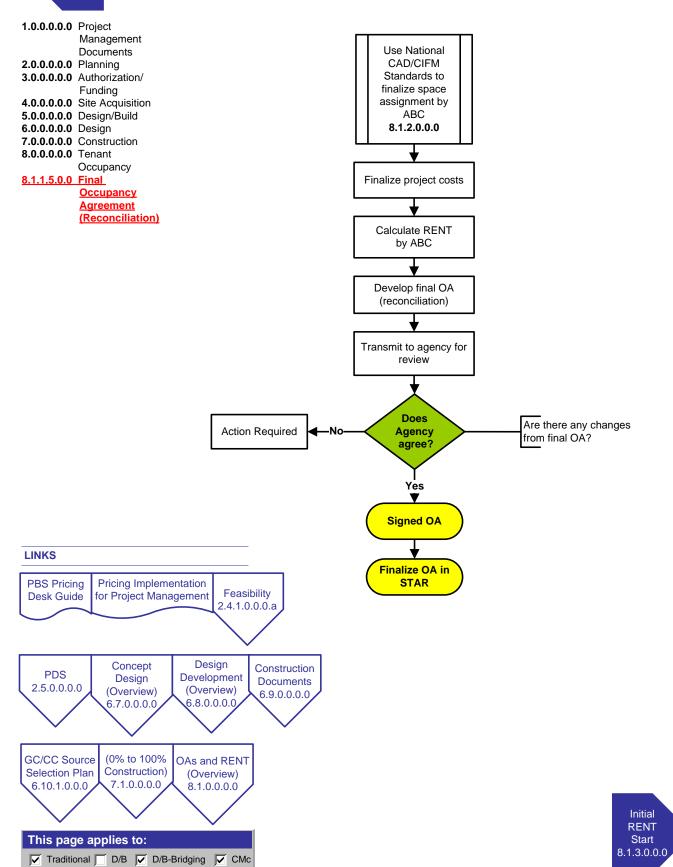
Agreement





8.0.0.0.0 Tenant Occupancy Traditional

8.1.1.5.0.0 Final Occupancy Agreement (Reconciliation)





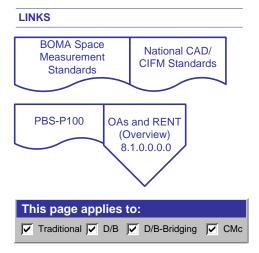
8.0.0.0.0.0 Tenant Occupancy *Traditional*8.1.2.0.0.0 National CAD/CIFM Standards

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 Design/Build
6.0.0.0.0 Design
7.0.0.0.0 Construction
8.0.0.0.0 Tenant
Occupancy

8.1.2.0.0.0 National CAD/

CIFM Standards

Project Team identifies funding source(s) Potential resources: A/E, Project Team reviews PMP and GC/CC or CMa contract confirms potential resources for options; or IDIQ task order National CAD/CIFM Standards CO awards contract option or task order for delivery of drawings Contractor prepares National CAD/CIFM Standards IAW contract specifications and submits to GSA for review CMa services may be Project Team reviews drawings utilized at any point and provides comments to throughout the project contractor process Contractor incorporates comments and submits final CAD drawings to Project Team **Project Team receives** CAD drawings and distributes to PBS library or regional CIO, field office, and tenants as appropriate



Final OA (Reconciliation) 8.1.1.5.0.0



8.0.0.0.0 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 Site Acquisition

5.0.0.0.0 Design/Build

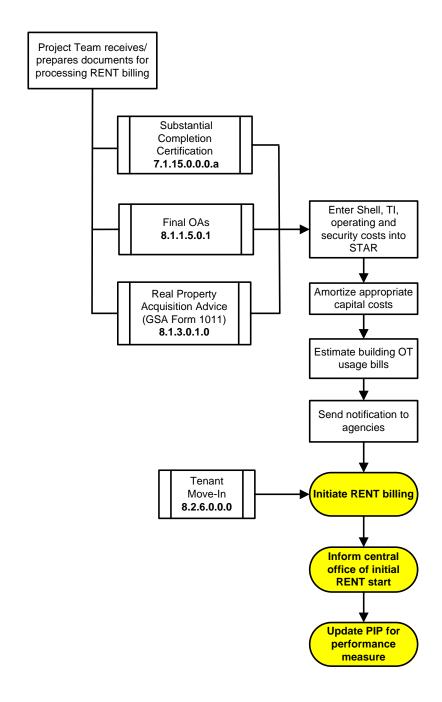
6.0.0.0.0. Design

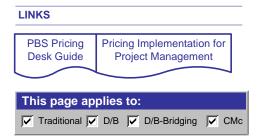
7.0.0.0.0.0 Construction

8.0.0.0.0.0 Tenant

Occupancy

8.1.3.0.0.0 Initial RENT Start









8.0.0.0.0 Tenant Occupancy Traditional

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

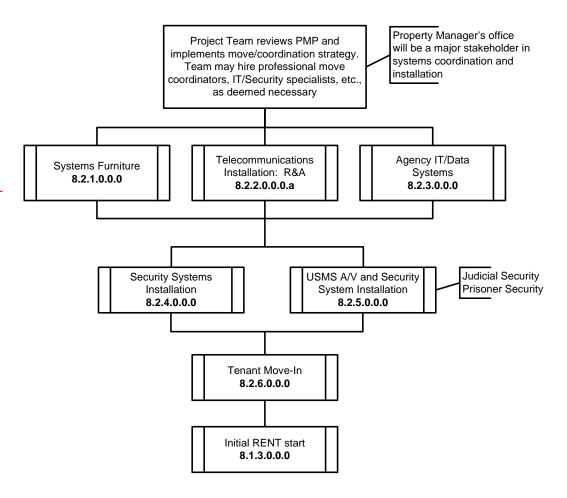
1.0.0.0.0.0 Project
Management
Documents
2.0.0.0.0 Planning
3.0.0.0.0 Authorization/
Funding
4.0.0.0.0 Site Acquisition

5.0.0.0.0.0 Design/Build6.0.0.0.0.0 Design7.0.0.0.0.0 Construction

8.0.0.0.0 Tenant
Occupancy

8.2.0.0.0.0 Furniture, Fixtures, and

Equipment (FFE)/Move-In (Overview)







Tenant Occupancy 8.0.0.0.0

8.0.0.0.0 Tenant Occupancy *Traditional* 8.2.1.0.0.0 Systems Furniture

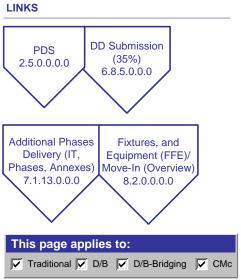
1.0.0.0.0.0 Project
Management
Documents
2.0.0.0.0.0 Planning
3.0.0.0.0.0 Authorization/
Funding
4.0.0.0.0.0 Site Acquisition
5.0.0.0.0 Design/Build
6.0.0.0.0 Design
7.0.0.0.0 Tenant
Occupancy

8.2.1.0.0.0 Systems

Furniture

ALL RESPONSIBILITY FOR **FURNITURE** (obtain documentation from agency) Project Team coordinates discussions, advises of options, and Agency procures, coordinates with proceeds with project installs, and inspects Project Team development furniture installation Agency Discuss age of Integrate into coordinates layout furniture and need for CPM schedule with design A/E repair/replacement with tenant agencies In-house Will Does tenant agency need new use in-house furniture? sources or FSS? No **FSS** A/E inventories Will furniture and tenant provides furniture use in-house layout in the design In-house sources for inventory and design or Agency coordinates with GSA field office for move of existing furniture A/E Agency coordinates Provide A/E estimate layout with for inventory and design A/E furniture design Obtain RWA from agency for furniture inventory and design A/E inventories **Federal Supply** furniture and procures, installs, and provides furniture inspects furniture layout in the design installation

AGENCY ASSUMES

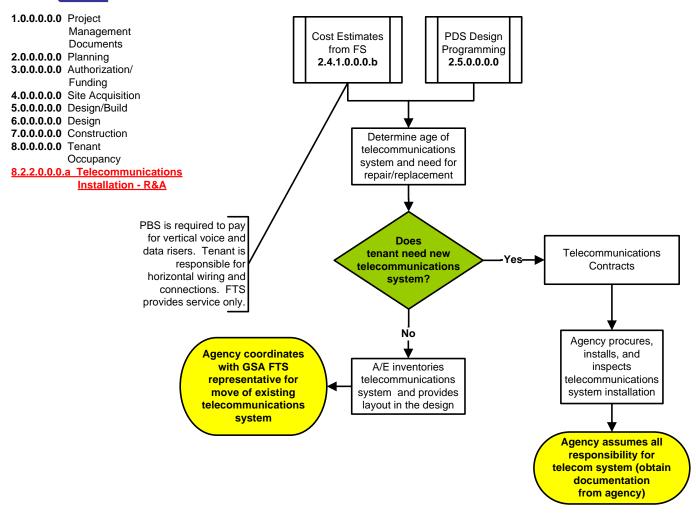


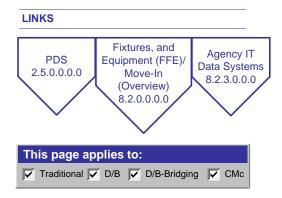
Tenant Occupancy

8.0.0.0.0.0

8.0.0.0.0 Tenant Occupancy Traditional

8.2.2.0.0.0.a Telecommunications Installation - R&A







8.0.0.0.0.0 Tenant

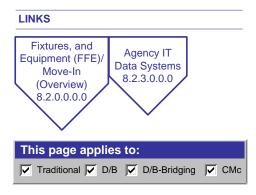
8.0.0.0.0 Tenant Occupancy Traditional

8.2.2.0.0.b Telecommunications Installation - New Construction

Occupancy
8.2.2.0.0.0.b Telecommunications
Installation - New

Construction

Additional Phases Tenant **CD** Submission Delivery (TI, Phases, **Telecommunications** (60-76%) Annexes) Requirements 7.1.13.0.0.0 agency use in-FTS house sources or FTS? In-house Agency procures, Agency coordinates installs, and inspects telecommunications telecommunications system design A/E system installation Will tenant use in-house sources Agency coordinates In-housefor inventory layout with design A/E **AGENCY ASSUMES** and design ALL RESPONSIBILITY FOR or A/E? **TELECOM SYSTEM** obtain documentation from agency) A/E inventories A/E telecommunications system and provides telecommunications Provide A/E estimate system layout in the for inventory and design telecommunications system design Develop **Telecommunications** Contract Obtain RWA from FTS procures, installs, agency for and inspects telecommunications telecommunications system inventory and system installation design





8.0.0.0.0. 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. Authorization/

Funding

4.0.0.0.0 Site Acquisition

5.0.0.0.0 Design/Build

6.0.0.0.0. Design

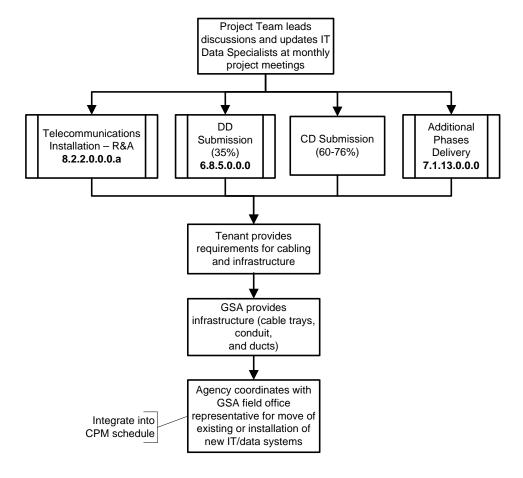
7.0.0.0.0 Construction

8.0.0.0.0.0 Tenant

Occupancy

8.2.3.0.0.0 Agency IT/Data

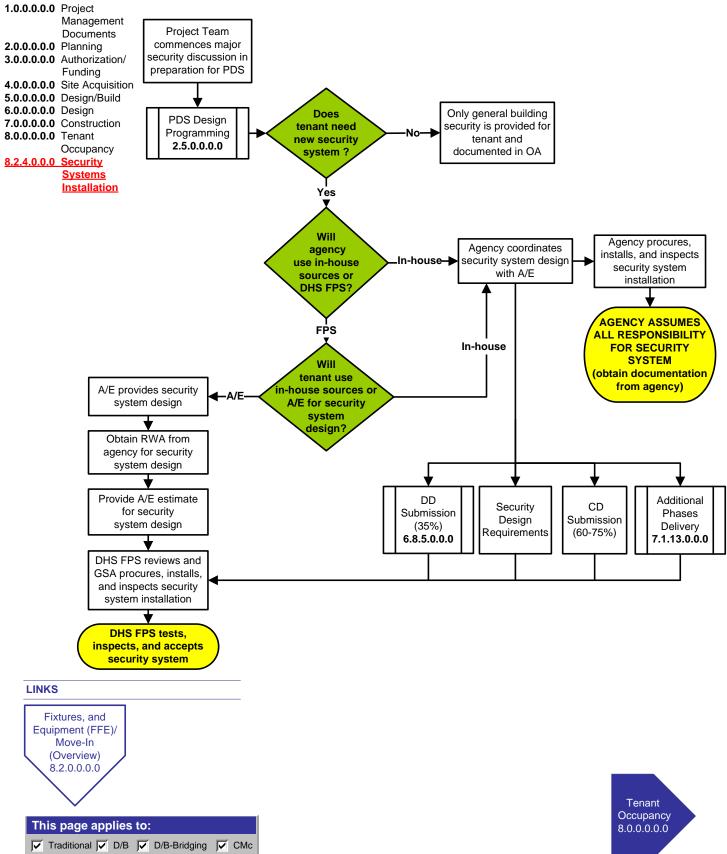
Systems



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



8.0.0.0.0.0 Tenant Occupancy *Traditional*8.2.4.0.0.0 Security Systems Installation





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. Design/Build

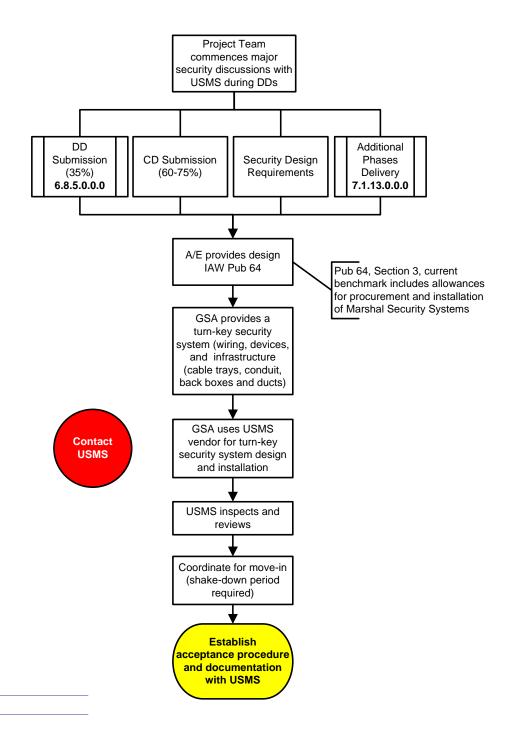
6.0.0.0.0.0 Design

7.0.0.0.0 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



Project Coordination 1.1.0.0.0.0.a

8.0.0.0.0 Tenant Occupancy *Traditional*8.2.6.0.0.0 Tenant Move-In

