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2010 CENSUS PLANNING MEMORANDA SERIES

No. 176

MEMORANDUM FOR The Distribution List

From: Arnold Jackson *[signed]*
Acting Chief, Decennial Management Division

Subject: 2010 Census Space Acquisition Assessment Report

Attached is the 2010 Census Space Acquisition Assessment Report. The Quality Process for the 2010 Census Test Evaluations, Experiments, and Assessments was applied to the methodology development and review process. The report is sound and appropriate for completeness and accuracy.

If you have questions about this report, please contact Karen Seebold at (301) 763-9340.

Attachment

2010 Census Space Acquisition Assessment

U.S. Census Bureau standards and quality process procedures were applied throughout the creation of this report.

Final

Karen Seebold, Field Infrastructure
Decennial Management Division



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Table of Contents

Executive Summary	vi
1 Introduction.....	1
1.1 Scope.....	1
1.2 Intended Audience	1
2 Background.....	1
2.1 Program Description	1
2.2 Cost	5
2.3 Budget Timing	5
2.4 Tracking Rent Expenses	5
2.5 Space Design.....	7
2.6 Opening and Closeout of the Early/Local Census Offices	7
3 Methodology.....	8
3.1 Methods	8
3.2 Questions to be answered and data sources used to answer them	8
4 Limitations	10
5 Results.....	10
5.1 What was GSA obligated to do for the Field Division?	11
5.2 What were the costs associated with GSA and UGL-Equis' involvement?	11
5.3 What was UGL-Equis contractually obligated to do for GSA?.....	11
5.4 How well did GSA fulfill their roles and responsibilities to the Field Division?.....	11
5.5 Was sufficient time allocated for the space acquisition process?	12
5.6 Were baseline dates met? If not, why not?	13
5.7 How many schedule change requests were needed? Why?.....	13
5.8 What media were used to communicate process changes to regional staff? What was the most effective method, according to regional and headquarters feedback?	13
5.9 What were the most common challenges encountered during the space acquisition process?.....	13
5.10 How can the Field Division more efficiently procure RCC and LCO space going forward	14
5.11 Was space acquisition training sufficient for regional staff to perform their duties?	14
5.12 What program and/or process changes were made between the opening of the ELCOs and the LCOs? Why?.....	14
5.13 Was the status reporting tool efficient in communicating milestone activities to critical parties during the E/LCO roll out phase?	15
5.14 How much did RCC and LCO rent cost for the 2010 Census?	16

5.15	Did the total cost stay within budget? Where did under and overspending occur and why?	16
5.16	How effective were the tools and aids provided for DID preparation?	20
5.17	How useful was the DID review process?	20
5.18	Was additional training needed for the DID process?	21
5.19	Was LCO office space adequately designed to allow flexible movement of computers for various operations?	21
5.20	Did SFOs result in a competitive process? Were there more or fewer bidders than expected?	21
5.21	Was the SFO used for RCCs effective in meeting Census space requirements?	21
5.22	Was the SFO used for the E/LCOs effective in meeting Census space requirements and management?	22
5.23	Did the SFO adequately address overtime HVAC, restroom, janitorial service, and parking requirements?	22
5.24	Was the Intrusion Detection System adequate for Census needs?	22
5.25	Was sufficient training provided to the regional staff regarding the IDS?	23
5.26	Were office space security requirements met?	23
5.27	Did the security requirements complicate the timing and cost of space acquisition?	23
5.28	Was the telecommunications system adequate to meet Census needs? What challenges did regional staff have in ensuring adequate telecom infrastructure in the LCOs?	23
5.29	Was sufficient flexibility designed into the space plans for the expansion and contraction of the various operations?	24
5.30	Was sufficient training provided to regional staff to effectively manage day-to-day the offices after deployment?	24
5.31	Did Field Division have the necessary subject matter experts (SME) available to provide program direction and oversight?	25
5.32	What improvements, if any, can be made to the closeout process?	25
6	Related Assessments	25
7	Key Lessons Learned, Conclusions, and Recommendations	25
7.1	Lessons Learned	25
7.2	Conclusion	26
7.3	2020 Recommendations	26
8	Acknowledgements	27
9	References	27
	Appendix A: Definitions	28
	Appendix B: Roles and Responsibilities	29
	Appendix C: RCC & PRAO Roles and Responsibilities	43

List of Tables

Table 1: 2010 Census Total Allocations and Actual Cost FY 2008-2011.....	5
Table 2: 2010 Census Space Cost.....	16
Table 3: Fiscal Year 2008 Cost.....	18
Table 4: Fiscal Year 2009 Cost.....	19
Table 5: Fiscal Year 2010 Cost.....	19
Table 6: Fiscal Year 2011 Cost.....	20
Table 7: Total Cost for the 2010 Census Space Rent	20

Executive Summary

The United States Constitution requires a census of population and housing to be conducted every ten years of people living in the United States. Prior to the actual census enumeration activities, a widespread network of temporary Regional Census Centers and Local Census Offices are opened to manage the collection of decennial data. As has been done in past censuses, a space acquisition program is established to lease the temporary office space. For the 2010 Census, 12 Regional Census Centers, one Puerto Rico Area Office, and 494 Local Census Offices were opened. These offices were located in all 50 states, the District of Columbia, and Puerto Rico. All major field operations were conducted from these temporary offices.

The 2010 Census Space Acquisition Program was considered a success, although throughout the program a number of challenges were encountered. Six of the twelve Regional Census Centers opened later than originally planned, as did a number of Early Local Census Offices, due to lease acquisition challenges. The Early Local Census Offices were further impacted by the Non-Response Follow-Up Re-plan, which occurred during their design and build-out phase. None of the delayed openings affected operational activities. Between the Early Local Center Offices and Local Census Offices acquisition phase the Census Bureau and other program stakeholders took into consideration lessons learned from the Early Local Census Offices experience and made adjustments for the Local Census Offices phase, adjusting activities and process steps beginning with the acquisition process through Office Computing Equipment deployment. These changes resulted in an improved and more efficient process for the remaining 344 Local Census Offices, which opened on schedule. The Census Bureau was able to start closing offices early and closed the last of the 494 Local Census Offices a few weeks before the scheduled finish date.

The total cost of the Space Acquisition Program was \$330,778,430 million dollars. Total costs include General Services Administration rent, Tenant Improvements, Operating Expenses, Department of Homeland Security Federal Protective Service fees, Reimbursable Work Authorizations, Security Work Authorizations, General Services Administration Fees, and miscellaneous expenses related to the 2010 Census.

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1. Introduction

1.1 Scope

The purpose of this assessment is to summarize the findings and recommendations from formal studies, debriefings, and reports.

This report documents the 2010 Space Acquisition Program that was implemented to locate and procure the Regional Census Center (RCC) and Local Census Office (LCO) space for the 2010 Census.

1.2 Intended Audience

The report is intended for the Census Bureau headquarters staff responsible for overseeing the 2010 and 2020 Censuses.

2. Background

2.1 Program Description

2.1.1 Space Leasing in Census 2000

There were some important differences between planning and executing the space acquisition program for the 2010 Census and Census 2000. Major differences between Census 2000 and 2010 Census include the following:

- 520 LCOs were acquired in Census 2000 in comparison to 494 LCOs in the 2010 Census.
- 402 Census Field Offices (CFOs) were leased in Census 2000, whereas no CFOs were acquired in the 2010 Census. The CFOs served as early census offices in 1999 to coordinate the Address Listing operation. The 151 Early Local Census Offices (ELCOs) served this purpose in the 2010 Census.
- No significant real estate contractor services were utilized by General Services Administration in Census 2000. In the 2010 Census, UGL-Equis played a significant role with GSA.
- Telecommunications deployment was conducted by Census Bureau personnel in Census 2000, whereas the Field Data Collection Automation (FDCA) contractor was responsible for this function in the 2010 Census.

2.1.2 Planning Space Acquisition for the 2010 Census

The Census Bureau established an extensive network of administrative offices across 50 states, the District of Columbia, and Puerto Rico to conduct the 2010 Census. In total, the 2010 Census opened 12 RCCs, the Puerto Rico Area Office (PRAO), and 494 LCOs. Planning for the 2010

Census office space started years prior to the first office acquisition, beginning in 2004 with a meeting between GSA and census executive staff and program managers to discuss high-level roles and responsibilities for the 2010 Census. In early January 2007, the Census Bureau received a consultant's report, "Consolidated Report: A Summary of the Space Optimization Evaluation and Build-Out Value Analysis for Local Census Offices" outlining census field office needs and preliminary cost estimates which were used to establish preliminary budgets for LCO space.

Information Technology (IT) security procedures were prominent in the 2010 Census. The National Institutes for Standards and Technology rewrote regulations for cyber security. These new regulations increased the complexity of planning layout and deployment of both the (RCCs) and LCOs. For example, telecommunications cable connections were required to be inside Census Bureau controlled space, or if the connections must occur outside of the rental space, the point of connectivity was securely protected with locked covering.

As in Census 2000, adequate coordination between GSA and Field Division (FLD) to secure and buildout office space on time and within budgetary constraints was critical to the program's success.

Varying requirements and workloads by office location meant adjustments were made on a case by case basis, as not all office space would be alike. Types of office space ranged from strip malls, Class B offices to historic buildings and former post offices. Each LCO had to have certain basic requirements which were clarified in the lease agreements between GSA and the Lessors upon signing lease contracts. Adequate loading dock space, electrical capacity, high speed internet, and telecom requirements were specified to find appropriate space in the marketplace.

Lease space durations of three to three and a half years for RCCs, 22 to 27 months for ELCOs, and 12 to 16 months for LCOs limited choices; landlords often did not comply with complicated federal lease regulations and the cost of buildout for leases less than the typical five to ten year commercial lease contract. Space planning included starting early in the process schedule and closely monitoring each project to ensure that all RCC and LCO spaces met Census Bureau requirements and were opened in time to conduct field operations.

Delineation of the 494 LCO boundaries and identifying the area of consideration within these boundaries to look for viable LCO space was based on a number of requirements. Primary among these requirements was placement of at least one LCO in each Congressional District (CD), along with the requirement to level the Non-Response Follow-Up (NRFU) workload among the 494 LCOs, absent regional geographic factors. Once the LCO boundaries were finalized, Geography Division (GEO) validated the delineation plans by analyzing the areas for logic and discrepancies. The Geography Division inserted the boundaries into the Master Address File/Topologically Integrated Geographic Encoding and Referencing (MAF/TIGER) database for geocoding and for use by other systems. Following LCO boundary delineation, the Area of Consideration (AOC) within each LCO boundary was identified. The AOC defined the geographic limits the Census Bureau and GSA would search for viable LCO space.

The Census Bureau worked with the GSA throughout the 2010 Census utilizing their space acquisition and lease management services to determine where office space was available in the AOC. To meet the Census Bureau's schedule requirements for the 494 LCOs, GSA contracted

with the commercial real estate company UGL-Equis to support the effort to find appropriate office space to lease in the targeted cities and towns. Market surveys were conducted to determine the viability of identified space within these areas.

Once viable space was identified, Solicitations for Offers (SFOs) were presented to Lessors interested in leasing space. The SFO establishes the requirements the Lessor must meet for the Census Bureau and GSA to accept the space. Lessors who submitted a response to the SFO proceeded to negotiations. After negotiations, the lease was awarded to the lowest bidder (Lessor) who met the SFO requirements. If the terms were agreed upon, leases were signed between GSA and the Lessor. Once leases were executed, the design, Tenant Improvement (TI) negotiation and the build-out construction phase followed. Architectural drawings referred to as Design Intent Drawings (DIDs) were developed to provide architects a suitable office plan to prepare construction drawings, which were subsequently used to guide construction crews during the build-out phase. Space was accepted once build-out was completed.

During the post-lease award phase of the process, a number of challenges were encountered. Lengthy TI negotiations following lease award resulted in some delay. Some lessors did not fully understand the difference between shell and TI expenses causing delay in the issuance of the Notice to Proceed (NTP) as clarification of the issue occurred. Some cities had long duration periods to acquire building permits. Due to the economic downturn, access to and the availability of credit for construction financing was a problem for Lessors in some areas.

Once the SFO buildout requirements were completed by the Lessor, GSA and regional Census Bureau staff took possession of the office space and were considered tenants. A certificate of occupancy (CO) was issued; full access rights were granted, along with the conveyance of keys to the space. At this point, the Census Bureau began to pay rent, however the space was not operationally ready until additional activities were completed.

As office spaces were accepted and full access rights conveyed, the next step involved Census Bureau's furniture supplier (CORT), delivering and installing the office furniture. The type and quantity of furniture necessary to support the office infrastructure was identified based on the staffing and space design for each location. Following furniture delivery, the FDCA contractor, Harris Corporation, began the telecommunications, office network, and Office Computing Environment (OCE) installation. Installation of the supporting infrastructure, such as the external telecommunications, was initiated as soon as the office locations were identified and leases signed. Under the provisions of the FDCA contract, the delivery and installation of the telecommunications circuits, telecom network equipment, cabling, telephones, computers, and printers, including testing the OCE in the E/LCOs, RCCs and the PRAO was coordinated. This phase of the LCO and RCC Space Leasing Program was considered the "Deployment Phase." Concurrent and immediately after offices were opened, non-automated equipment (copiers, mail meters, etc.) and supplies were delivered by Census Bureau vendors to prepare arriving staff for operational activities.

RCCs were the first offices to open beginning in November 2007 and were located in each Regional Office city. The RCCs remained open until September 2011. The original 151 ELCOs opened between nine months and a year prior to the opening of the LCOs (fall of 2008 to spring of 2009) and were eventually converted to LCOs in the fall of 2009 when the additional 344

regular LCOs opened. This brought the total of open LCOs to 494¹. All LCOs remained open at least through the end of June 2010 when LCO closeout activities began. All of the LCOs closed early with the last two offices closing on November 12, 2010, nearly three weeks before the November 30, 2010 deadline.

The SFO outlined general federal government and Census Bureau-specific space requirements for Lessors to ensure the scope of work and facility requirements necessary for GSA to accept the space. GSA evaluated all offers and prepared lease documents along with negotiating build-out costs and comparing them with independent government cost estimates. GSA prepared and issued NTP documents to the Lessors (the authority to begin construction), and monitored construction progress all the way through site completion and site acceptance (which included in-person inspections to ensure compliance with SFO regulations).

Though the LCOs opened on time with no delays, a number of potentially serious issues were encountered, along with some complications that could not be anticipated. For example, one landlord changed his mind late in the acquisition schedule and refused to sign the lease in Casper, Wyoming. Although there was a scarcity of viable commercial space on the market in Casper, GSA was able to quickly find a replacement and open the office before the December 4, 2009 deadline for opening all LCOs. In another case, after the Bowling Green, Ohio LCO lease was signed, the building went into foreclosure before the space was built-out and accepted from the Lessor. The entire space leasing process had to start over from the beginning and be expedited in order to successfully open the Bowling Green LCO on time.

¹ In Puerto Rico, an ELCO was moved out of the PRAO into a stand alone LCO accounting for the discrepancy when adding 151 ELCOs and 344 LCOs.

2.2 Cost

Table 1 below shows the allocations and costs for each Fiscal Year (FY) 2008 through 2011. The space acquisition program was \$6 million over the planned budget of \$324.8 million from FY 2008 through FY 2011. The deficit figure for the program does reflect credit for the de-obligation of rent, Reimbursable Work Authorization and Security Work Authorization funds, and GSA rent and DHS-FPS credits to the Census Bureau – which totaled \$23.9 million.

**Table 1: 2010 Census Total Allocations and Actual Cost*
FY 2008 – 2011**

2010 Census Budget	FY08	FY09	FY10	FY11
RCC Allocation	\$14,886,738	\$16,080,940	\$16,415,052	\$10,890,452
RCC Actual	\$14,805,556	\$17,356,182	\$16,143,891	\$10,701,314
TOTAL	\$81,182	(\$1,275,242)	\$271,161	\$189,138
LCO Allocation	\$3,800,000	\$216,654,782 [†]	\$37,442,066	\$8,608,368
LCO Actual	\$1,494,413	\$220,927,037	\$40,041,332	\$8,497,530
TOTAL	\$2,305,587	(\$4,272,255)	(\$2,599,266)	\$110,838

Source: Financial Management Reports

* Space cost includes rent, tenant improvements, Department of Homeland Security fees, Operating Expenses, and related costs of occupancy.

[†] Includes funding of \$20,950,725 provided by an unfunded request not allocated to the FY09 project.

2.3 Budget Timing

Census Space Leasing Program managers were advised that government accounting rules require obligation of the full cost of leases in the FY the lease contracts are signed. However, this was not how the allocation of funds for space was planned for the 2010 Census. LCO leases entered into from May through September 2009 for occupation in September-December 2009 through the end of the lease term had to be obligated using FY 2009 project funds. Rent had to be obligated all at once upon signing the contract, even though the money would be paid out month to month through the duration of the lease period. The same was true for FY 2010.

2.4 Tracking Rent Expenses

LCO and RCC space-related expenses were split between two separate projects, one covering all LCOs and one for 12 RCCs and the PRAO. Financial obligations were established with Finance Division to cover costs related to rent, tenant improvements, operating expenses, GSA fees, and other expenses related to occupancy of space; along with required Department of Homeland Security – Federal Protective Service (DHS-FPS) fees based on the Rentable Square Feet (RSF) of occupancy. These expenses were directly billed to the Census Bureau via the Intra-Governmental Payment and Collection (IPAC) billing system covering all Census Bureau-related expenses incurred. Establishment of the projects' Operating Plan involved identifying regular monthly planned expenses, and estimating irregular potential costs for Overtime Heating,

Ventilation, and Air Conditioning (OT-HVAC) and minor space alterations. Rent and FPS obligations were fairly predictable, due to the consistent monthly rent charge. Variance from the Operating Plan was usually limited to unplanned Reimbursable Work Authorizations (RWAs) or Security Work Authorizations (SWAs) to pay for OT-HVAC needs, modification to the space, or the need to hire DHS-FPS security personnel for LCOs.

Census did not receive timely and correct GSA and DHS invoices when LCOs and RCCs were beginning to be accepted, or as these offices closed. During these periods it was difficult to predict monthly expenses, and thus follow an operating plan closely for a given month. However, these periods were easily identified in the schedule. The course of action typically involved placing a large portion of the allocations into an obligation for the FY, with any unused funding obligated at the end of the FY. The obligation of project funds and the tracking of monthly actual expenditures against the obligations were complicated due to a financial requirement to obligate project funds by individual LCO as opposed to a single obligation of funds covering all LCOs. FLD had to establish, and maintain, a minimum of 494 individual obligations for GSA rent and 494 individual obligations for DHS-FPS fees. Invoices received were charged against the obligated funds for each LCO, drawing down the balance. A number of problems were encountered in using this approach, including:

- Obligating additional monies in a timely manner to pay the IPAC billing at the end of the month; an individual LCO obligation if underfunded by as little as \$1, would delay payment of the entire IPAC bill to GSA.
- Previous year's obligations were not fully drawn-down, instead invoices were charged to current year obligations only. This resulted in unused obligation funds and increasing the number of outstanding obligations.
- Inability to quickly de-obligate and re-obligate funds due to the significant number of obligations.
- Extensive reporting, documentation, data entry, and tracking of expenditures for Administrative and Customer Services Division, Finance and FLD, along with multiple systems to access and reference to verify expenses and determine multiple obligation balances spanning multiple FYs at the individual LCO level.

Obligating and tracking RCC and the PRAO expenses within the project allocation – separate from the LCO project allocation - was much easier as there were only a total of 13 offices.

Unexpected cost overruns in the LCOs were primarily due to higher than planned rent and TI expenses, unexpected OT-HVAC charges incurred during the spring and summer of 2010; and during the closeout period, delayed billing for OT-HVAC usage and a few damage claims, e.g., carpet replacement. Unlike Census 2000 where in many offices Census did not incur substantial OT-HVAC charges, the 2010 Census occurred at a time when Lessors and property managers were diligent about monitoring and tracking these types of expenses and seeking reimbursement to cover their costs.

2.5 Space Design

The Census Bureau hired a contractor to review LCO layout requirements and to provide an office space template. The model LCO layout took into consideration lessons learned from the 2006 Austin, Texas Test Site. A number of LCO space prototype designs based on the size of the office space were provided.

Field Division staff prepared the RCC and LCO DIDs. This was the process in which the model office was tailored to the actual LCO space. FLD also hired an architect to prepare job aids and related space design planning materials, and to help the Lessors understand the space requirements. The Lessors ranged from “mom and pop” investors in small towns to large commercial real estate companies. Some space was even leased from other governmental entities.

The Census Bureau worked with the FDCA contractor to review the DIDs to ensure the correct number of telecommunication outlets, telephones, computers, and related OCE were in the drawings. In addition, FLD reviewed the DIDs to ensure compliance with required room size, furniture and equipment, electrical outlets, security systems, door hardware, and floor covering. Once buildout was complete, GSA and the Census Bureau representatives inspected the space to make sure it was completed in accordance with the requirements.

2.6 Opening and Closeout of the Early/Local Census Offices

The RCCs were the first decennial offices to open beginning in January 2008. The RCCs were staffed with Regional Office personnel as well as temporary employees. The first regional space leasing staff, the Space Leasing Coordinator and Representatives, were hired starting in July 2007 and at the beginning of FY 2008 (October 2007), respectively. These individuals initial responsibilities were to work with GSA to complete the opening of the RCCs (following space leasing training) and to find ELCO space, which occurred during the winter of 2007-2008 and spring of 2008.

Acquisition of the 151 ELCOs was the second phase; these offices were opened to handle the recruiting and operational needs of the Address Canvassing operation. The target date to open the ELCOs was by the fall of 2008. The other 344 LCOs were opened from late July to early December 2009. Additional Space Leasing Representatives were hired beginning June of 2008 to work with GSA to acquire and build-out the LCOs. Once all LCOs were opened, the Census Bureau discontinued the reference to ELCOs, referring to all as LCOs; the 494 LCOs were operationally ready by early December 2009.

After the various decennial operations were completed (except for Census Coverage Measurement [CCM] field operations), the 494 LCOs were closed. All LCOs closed approximately a month early following a well-planned and coordinated closeout operation which began in June 2010. Sometimes referred to as the “De-installation Phase,” the execution of the closeout activities involved numerous stakeholders; their cooperation enabled the Census Bureau to close the last LCOs on November 12, 2010 – nearly 3 weeks earlier than the adjusted baseline. The original baseline date was December 31, 2010. The remaining field activities associated with the CCM were managed out of the RCCs. The RCCs underwent a reduction in size of

approximately 50-60 percent, from December 2010 through March 2011. Final closeout of the RCCs was completed by September 14, 2011.

3. Methodology

3.1 Methods

We utilized the following reports and lessons learned to answer the questions outlined in section five. Though other reports and sources were used to write this report, the following sources were gathered by Decennial Management Division to specifically address each of the following questions.

3.2 Questions to be answered and data sources used to answer them

Question	Question	Data Source
1	What was GSA obligated to do for the Field Division?	2010 Census Detailed Operational Plan, LCO Procurement Process Plan
2	What were the costs associated with GSA and UGL-Equis' involvement?	GSA's Pricing Policy Document
3	What was UGL-Equis contractually obligated to do for GSA?	Field Division Planning Documentation
4	How well did GSA fulfill their roles and responsibilities to the Field Division?	Space Leasing Debriefing Results Report
5	Was sufficient time allocated for the space acquisition process?	Space Leasing Debriefing Results Report
6	Were baseline dates met? If not, why not?	DMD Master Activity Schedule
7	How many schedule change requests were needed? Why?	DMD Master Activity Schedule
8	How were program/process changes communicated to the regional staff? What was the most effective method according to regional and headquarters feedback?	Space Leasing Debriefing Results Report
9	What were the most common challenges encountered during the space acquisition process?	Space Leasing Debriefing Results Report
10	How can RCC and LCO space be procured more efficiently?	Space Leasing Debriefing Results

Question	Question	Data Source
		Report
11	Was space acquisition training sufficient for regional staff to perform their duties?	Space Leasing Debriefing Results Report
12	What program and/or process changes were made between the opening of the ELCOs and the LCOs? Why?	GSA LCO Procurement Policy email, 2/11/09
13	Was the status reporting tool efficient in communicating milestone activities to critical parties during the E/LCO roll out phase?	Space Leasing Debriefing Results Report
14	How much did RCC and LCO rent cost for the 2010 Census?	FMRs, ACSD Rent Reports, RWA/ SWA Cost data, and Finance Division Custom Report
15	Did the total space cost stay within budget? Where did under and overspending occur and why?	DMD Financial Management Reports and Finance Division Custom Reports
16	How effective were the tools and aids provided for DID preparation?	Space Leasing Debriefing Results Report
17	How useful was the DID review process?	Space Leasing Debriefing Results Report
18	Was additional training needed for the DID process?	Space Leasing Debriefing Results Report
19	Was LCO office space adequately designed to allow flexible movement of computers for various operations?	Space Leasing Debriefing Results Report
20	Did SFOs result in a competitive process? Were there more or fewer bidders than expected?	Space Leasing Debriefing Results Report
21	Was the SFO used for RCCs effective in meeting Census space requirements and management?	Space Leasing Debriefing Results Report
22	Was the SFO used for the E/LCOs effective in meeting Census space requirements?	Space Leasing Debriefing Results Report
23	Did the SFO adequately address overtime HVAC, restroom, janitorial service, and parking requirements?	Space Leasing Debriefing Results Report

Question	Question	Data Source
24	Was the Intrusion Detection System (IDS) adequate for Census needs?	Space Leasing Debriefing Results Report
25	Was sufficient training provided to the regional staff regarding the IDS?	Space Leasing Debriefing Results Report
26	Were office space security requirements met?	Office of Security (OSY) Report
27	Did the security requirements complicate the timing and cost of space acquisition?	Space Leasing Debriefing Results Report
28	Was the telecommunications system adequate to meet Census needs? What were some of the office challenges, if any encountered, to ensure adequate telecom infrastructure was present?	Space Leasing Debriefing Results Report
29	Was sufficient flexibility designed into the space plans for the expansion and contraction of the various operations?	Space Leasing Debriefing Results Report
30	What challenges did regional staff have in ensuring adequate telecom infrastructure in the LCOs?	Space Leasing Debriefing Results Report
31	Did Field Division have the necessary subject matter experts available to provide program direction and oversight?	Space Leasing Debriefing Results Report
32	What improvements, if any, can be made to the closeout process?	Space Leasing Debriefing Results Report

4. Limitations

There were no limitations related to the results found in this report.

5. Results

The following questions were previously approved via the Space Acquisition Study Plan. The methods and source documents listed in Section 3 of this report were used to answer the questions and provide insight and analysis for each subject matter.

5.1 What was GSA obligated to do for the Field Division?

The GSA was obligated to provide lease acquisition and lease management services to the Census Bureau for the 2010 RCCs and LCOs. There is no specific document that describes the level and type of services provided. Although a draft Memorandum of Understanding was prepared, the document was never signed by GSA per advice of their Legal Department.

5.2 What were the costs associated with GSA and UGL-Equis' involvement?

Compensation to GSA was based on a flat percent Public Buildings Service (PBS) fee of 5 percent over the cost of rent, TI, operating expenses, and other expenses related to the occupancy of the RCC and LCO space by FLD. Based on the cost of rent, buildout, operational expenses, and related expenses paid to GSA, GSA received approximately \$14 million in fees for the LCO and RCC space during the FY 2008 – 2011 period. No compensation was paid directly to UGL-Equis by the Census Bureau. GSA compensated UGL-Equis from the 5 percent PBS fee applied to the rent bills the Census Bureau pays to GSA.

In addition, GSA received compensation for RWAs the Census Bureau established to pay for OT-HVAC, janitorial services, minor space alterations, and build-out expenses. The compensation GSA received was based on a flat project management fee of 4 percent of the total work estimate, plus an additional sliding scale overhead fee based on the type and total cost of the reimbursable work. The sliding scale fee varies depending on which cost range category the reimbursable work falls into; fees range from 10 percent to 0.5 percent.

5.3 What was UGL-Equis contractually obligated to do for GSA?

GSA contracted with UGL-Equis to provide lease acquisition services, along with services for lease/build-out negotiation, monitoring of build-out, and related activities through acceptance of the LCO space (UGL-Equis did not provide services for the RCC space acquisition).

5.4 How well did GSA fulfill their roles and responsibilities to the Field Division?

GSA acquired 100 percent of the LCO space on time, which allowed FLD to conduct all 2010 Census field activities on time. The perspective of GSA's performance varied among Census regions. Fifty-seven percent of regional staff considered GSA performance Excellent or Good, the balance falling into the Fair or Poor category. FLD's point of view is different, which is likely attributed to the difference between the macro and (regional) micro-level perspectives. FLD recognized isolated cases of poor performance with GSA staff, but overall GSA did a good job within their scope of responsibility – meeting our primary deadlines to have all space open on time to conduct field activities. GSA activities that were not performed well included: timely lease execution; follow-up communication; inconsistent or lack of adequate resources; lack of a clear understanding of Census Bureau requirements; and lack of attention to deadlines. Regional staff often had to supplement tasks GSA normally was responsible to perform, such as

conducting market surveys, periodic build-out inspections, walkthroughs for acceptance and closing, and wind-shield surveys to identify potential properties to view. However, this was expected due to our inflexible schedule, tight deadlines, large workload and often encountered challenging circumstances in markets where additional resource attention was required.

GSA established primary project managers at the National and Census Regional level. GSA subject matter experts were available for process and policy advice, compiling and issuing reports; communication among team members during project implementation; conducting market surveys; ensuring leases were processed correctly; and served as the Contracting Officer (CO). UGL-Equis' effort to negotiate buildout charges may have resulted in substantial savings to the Census Bureau. The estimated cost savings between the Lessor's initial bid and the final agreed to TI cost was in the range of \$13 million – \$18 million dollars. This estimate is an extrapolated value of savings based on cost data UGL-Equis provided the Census Bureau for 46 LCOs covering the Seattle and Kansas City regions. Applying this rate of savings to 344 LCOs results in \$13 million in potential savings, and if applied to the 494 E/LCOs up to \$18 million savings in TI costs may have been realized.

5.5 Was sufficient time allocated for the space acquisition process?

Planning for sufficient time to acquire 494 LCOs is not an exact science due to the variable nature of the real estate markets encountered from one location to another. Following discussions with GSA, and their market experience, the Census Bureau agreed to establish as a general rule a one-year time period to acquire, build-out, and accept LCO space.

Although GSA encountered difficulty in securing space in a small number of instances, which impacted the space acquisition schedule, most of these challenging situations occurred during the ELCO phase and included: lack of viable properties, Lessors declining to respond to the solicitation, Lessors inability to secure lines of credit, delays in design and construction due to the NRFU re-plan from an automated to a paper-based design operation for the ELCO space, and timely and adequate staffing resources. The Census Bureau encountered less of a schedule impact to these challenging situations during the LCO phase.

The lack of viable properties and Lessors declining to respond to the solicitation was typically due to our space requirements – extensive build-out requirements for a short lease period, along with a detailed and fairly complicated lease package. The economic situation prevalent nationwide involving the housing crisis and overall recession resulted in banks limiting Lessors' access to a line of credit. Delays in construction were encountered due to the NRFU re-plan implementation occurring in the midst of the design. Adequate staffing resource challenges were encountered during the ELCO phase due to hiring the first group of Space Leasing Specialists later than planned. Hiring these staff earlier would have provided time to train, and build working relationships with Census management, GSA and UGL-Equis counterparts, in addition to learning about the program requirements. By September – October 2007, windshield surveys, program kick-off meetings, and market surveys were already being conducted – sometimes before the dedicated Leasing Specialists for the ELCO phase were hired. Regardless of these challenges, all space was acquired in adequate time to conduct 2010 Census activities.

5.6 Were baseline dates met? If not, why not?

The Census Bureau was late completing two major base line activities concerning space acquisition.

The first major milestone, “RCCs and PRAO Open” finished late by several weeks. It was scheduled to finish on January 31, 2008 but did not finish until April 7, 2008. The delay was from staff taking more time than anticipated to find and secure office space.

The second late activity was “2010 ELCOs Open”, finishing this milestone and missing the scheduled finish date of February 19, 2009; it finished five weeks late on March 24, 2010. In 2009 Field Division, found it difficult to find and secure contracts for all 151 ELCOs on time, due to eleven ELCOs that were accepted later than planned. These late acceptances did not jeopardize field operations because FLD pursued contingency actions (e.g., using adjacent ELCO offices to conduct recruiting activities). (See Question 5.5)

5.7 How many schedule change requests were needed? Why?

There was one major change request in the Space Leasing schedule during the 2010 Census. In 2010, it became clear as Non-Response Follow-up work finished that many of the LCOs could be closed earlier than anticipated. As a result, the Census Bureau moved up the finish date of the LCO closeout from December 31, 2010 to November 30, 2010. A change request was approved to alter the master activity schedule.

5.8 What media were used to communicate process changes to regional staff? What was the most effective method, according to regional and headquarters feedback?

FLD released frequent operation logs that often contained procedural guidance and updates and conducted conference calls with the RCCs as the primary method to communicate changes to regional staff. The RCCs considered written operational log updates, meeting minutes, and conference calls as the most effective method(s) to communicate information.

5.9 What were the most common challenges encountered during the space acquisition process?

A number of challenges were encountered during the space acquisition phase. Some examples are:

- 1) GSA and UGL-Equis did not initially understand Census Bureau space requirements, including mandatory/preferential requirements in the SFO.
- 2) The Lessors did not understand the telecommunications infrastructure, the magnitude of material delivery at an office site, or the floor load requirements in storage areas.
- 3) Lack of viable properties in a number of markets
- 4) Non-responsive Lessors – some Lessors did not bother to bid on the SFO because the costs of leasing to the Census Bureau far outweighed the benefits.

- 5) Ability of Lessors/contractors to secure funding for build-out – the state of the economy greatly affected the ability of Lessors to obtain financial assistance, through loans, to assist with building out leased space.
- 6) No telecommunications infrastructure presence in proximity of potential office sites, and
- 7) Bankruptcy of Lessors

5.10 How can the Field Division more efficiently procure RCC and LCO space going forward?

There are several suggestions how RCC and LCO space could be procured more efficiently. These include: 1) simplify the Market Survey Form and process, 2) engage GSA/UGL-Equis brokers/staff dedicated to only the Census Bureau project, 3) expand Census Bureau staff responsibility to support GSA/UGL-Equis' role earlier, including more extensive space leasing training in the acquisition process, 4) simplify the SFO by clarifying text and shortening the length of the document, 5) improve inter-team communication and make automated space tracking system enhancements, and 6) tighten stakeholder accountability and share status reporting among the stakeholders.

5.11 Was space acquisition training sufficient for regional staff to perform their duties?

Based on feedback from the regional space leasing representatives/coordinators, the majority of attendees considered the training positive, and were fully or adequately prepared to complete their space leasing functions. Regardless, there were suggestions for improvements, including: more extensive in-depth training, a more detailed training manual, more training on the technical aspects such as telecom requirements, Computer-Aided Design (CAD) and the Intrusion Detection System (IDS); and removing the “soft” sections (e.g., relationship building) of the training.

5.12 What program and/or process changes were made between the opening of the ELCOs and the LCOs? Why?

Between Phase 1 (ELCO Phase) and Phase 2 (LCO Phase) Census Bureau stakeholders were debriefed and a number of process changes were identified. Process changes were made and implemented by GSA/Equis, Harris, and the Census Bureau. The following are some of the major changes:

Census Bureau:

- Reduced regional decision time frame for sites to solicit from three to two days
- Revised job aids for the preparation of DIDs and OCE quantity verification
- Developed classroom training for staff on the DID process
- SFO requirements were finalized and eliminated change requests during the DID process
- Reduced DID iterations to a maximum of three, and shortened the 45-day DID prep window to minimize project delays
- Reduced time frame between lease award and lease acceptance by reviewing the DIDs earlier

- Increased oversight
- Implemented weekly phone calls with regions and an escalation process if no progress was reported after allotted time

Adjustments FLD incorporated into the process enabled the Census Bureau and GSA to shorten the overall build-out phase. Following the execution of the lease, delays were limited and no design changes were authorized. By monitoring and discussing the progress of the effort with the regions weekly, the Census Bureau identified potential problems earlier and introduced contingency/action plans more quickly according to stricter guidelines. This was in response to some Lessors in Phase 1 who took too much time responding to the SFO. Adherence to the overall schedule and program requirements were achieved.

GSA/UGL-Equis:

- Adopted electronic automated format for lease approval process
- Changes were controlled through GSA National
- Equis prepared the lease package as opposed to circulating it through GSA
- Improved the Occupancy Agreement (OA) by developing a standardized form
- Increased HQ oversight with additional resources – closer monitoring

The modifications GSA/Equis adopted, benefited the acquisition portion of the program by minimizing document handling among the responsible parties and shortening the approval process for lease execution. Centralizing space requirement changes, controlled by HQ staff and distributed to the regions, allowed GSA to ensure correct and timely distribution among their team. Post lease award, the GSA modifications, such as closer monitoring, dovetailed well with Census Bureau efforts to more closely monitor the acquisition and buildout phases. GSA and the Census Bureau conducted joint conference calls with the regions weekly. These efforts were particularly beneficial throughout the project to alleviate potential delays and if necessary, introduce contingency actions as the teams worked to finalize acceptance of all LCO space.

5.13 Was the status reporting tool efficient in communicating milestone activities to critical parties during the E/LCO roll out phase?

Status reporting was maintained by a variety of report formats that were updated by several of the stakeholders involved in the program, including: Census Bureau headquarters (customized Excel spreadsheets), GSA (customized Excel spreadsheets and Jacobs Engineering reports).

UGL-Equis transmitted updates via Siterra (a commercially available integrated web based software solution by Siterra Corporation used by real estate professionals to manage remote sites and leases using asset tracking and real estate management software) and Census Build. Harris Corporation created GEKO (Government Communications Services Division Engineering Knowledge Oasis), a web based file repository to help the Census Bureau and Harris communicate LCO readiness via the internet. It was an internal Harris tool adopted for the 2010 Census. Various other region specific status reports were also used, in Excel, to communicate milestones.

The process was effective; however, it was also inefficient and redundant. For example, all stakeholders maintained their own status reporting tools. This created duplicate data entry tasks, different data formats, and often conflicting information.

5.14 How much did RCC and LCO rent cost for the 2010 Census?

The following cost information is disaggregated by FY and includes four types of expenditures: GSA Rent, Department of Homeland Security Federal Protection Service Fees, RWAs, and SWAs. These values represent actual expenditures and not project allocations, but do include current obligations to FIN Division established for this program. The values do not include pending rent credits the Census Bureau will receive from GSA during FY12. Also, the following space costs do not include furniture/supplies or any Census Bureau owned or leased property inside the rented space.

Table 2 below outlines the amount spent for RCC and LCO space during the 2010 Census.

Table 2: 2010 Census Space Cost*

Space Type	FY08 Actual	FY09 Actual	FY10 Actual	FY11 Actual	Total Cost
RCC	\$14,805,556	\$17,356,182	\$16,143,891	\$10,701,314	\$59,006,944
LCO	\$1,494,413	\$220,927,037	\$40,041,332	\$8,497,530	\$271,771,486
Total	\$21,337,291	\$251,438,933	\$62,655,115	\$19,198,844	\$330,778,430

Source: Financial Management Reports

* Space cost includes rent, tenant improvements, Department of Homeland Security fees, Operating Expenses, and related costs of occupancy.

5.15 Did the total cost stay within budget? Where did under and overspending occur and why?

Higher than expected costs were encountered for rent, and OT-HVAC services. Within these two broad categories, the bulk of the overspending was attributable to the following:

- 1) Rent and TI costs in certain LCO markets exceeded budget projections
- 2) Projections for annual OT-HVAC use was not close to actual usage, resulting in Lessors' inability to accurately bid cost of services received
- 3) Unexpected operational impacts requiring increased staffing hours
- 4) Tenant agency's unawareness that it is responsible for OT service if space is occupied with personnel regardless if OT-HVAC is scheduled

LCO rent and tenant expenses in select U.S. and Puerto Rico markets exceeded budget expectations. This was evident in all regions, but the highest concentration was encountered in Chicago and New York, although it was not surprising to encounter higher rents in these regions. In addition, the overall average cost for LCO space was slightly higher than expected based on the model used to prepare the program budget.

In preparing the SFO with GSA, the Census Bureau projected the annual usage for OT-HVAC, which allowed the Lessor to submit a bid to reflect the costs associated with providing the estimated level of service. The Census Bureau paid for usage in excess of the projections via an RWA. Unfortunately, in nearly all instances, actual usage far exceeded the projected annual estimate, resulting in significant usage charges being paid via an RWA. Contributing to the level of service required, operational staffing hours increased due to unexpected system constraints with the Paper Based Operations Control System. The operational and administration impacts resulted in a significant number, if not all, of the LCOs to remain open 24 hours a day, including weekends, during the spring of 2010. Although 24/7 operations are encountered during every decennial census, the duration was greater than previously encountered. Future space requirements should also ensure controlled access thermostats are identified in the requirements along with timer devices to restrict LCO staff without authorization to change temperature levels, often inadvertently resetting thermostats overnight.

5.15.1 Fiscal Year 2008

The cost of RCC rent and TI was slightly less than the FY 2008 budget, but this was due to a few RCCs opening later than planned. Refer to Table 3 below. High RCC TI costs were encountered in Boston, New York, and Chicago, relative to the other regions. Budget forecasts did not expect these RCC costs to be as high, resulting in a deficit for the next FY in the RCC project. Adjustments were made for subsequent fiscal years. Also, the Census Bureau did not originally budget any LCO rent money in FY 2008 because there was no plan to start paying rent and TI expenses until the start of FY 2009. However, once leases were awarded and the build-out phase started, the RWA had to be obligated prior to initiating construction work in order for GSA to authorize the Lessors to proceed on any TI funded through an RWA as opposed to amortizing over the term of the lease. The Census Bureau funded \$3.8 million via reprogramming for ELCO TI expenses in FY 2008 to allow for work to commence.

Table 3: Fiscal Year 2008 Cost

Space Type	FY08 Allocation	FY08 Actual	Deficit/Surplus
RCC	\$14,886,738	\$14,805,556	\$81,182
LCO	\$3,800,000	\$1,494,413	\$2,305,587
Total	\$18,686,738	\$16,299,969	\$2,386,769

Source: Financial Management Reports

5.15.2 Fiscal Year 2009

Comparing actual expenditures to the allocation in FY 2009 for LCO space was complicated due to an action late in the FY to obligate projected rent and buildout expenses for FY 2010. The Census Bureau obligated a large sum in August 2009 for future FY 2010 expenses, per a request from Budget Division - an action based on an interpretation of federal Anti-deficiency statutes. The interpretation of the statutes required the Census Bureau to obligate all rent expenses upon execution of each lease contract. Though rent and related expenses were to be spent in FY 2010, the entire firm term lease cost had to be obligated in the FY the contract was signed. The firm

term was defined as the period of the lease term the Census Bureau was obligated to pay for 100 percent of rent, whether a tenant or not. In addition, for nearly all LCOs this was the period over which TI expenses were amortized; 12 months for LCOs and 22 to 23 months for ELCOs. The action resulted in deficit spending in FY 2009 relative to the planned allocation. Table 4 below compares the planned to the actual expenditures. The FY 2009 LCO Space project used \$4.3 million more than the original spending plan anticipated.

To help cover the earlier than expected LCO rent obligation, DMD reallocated \$154 million during FY 2009 – most of the money came from the FY 2009 reserves. The \$154 million originally planned for FY 2010 is represented here as part of the FY 2009 plan (original FY 2009 allocation of \$63 million plus \$154 million of reallocated funds equaling \$217 million). Because the funds were no longer needed in FY 2010, they were not included in the 2010 allocation issued October 2010 (see the next section).

RCC expenditures in FY 2009 resulted in a deficit, due to higher than expected rent and TI expenses in Boston, New York, and Chicago. Adjustments were made to the planned allocation for the RCCs in subsequent fiscal years to prevent deficit spending.

Table 4: Fiscal Year 2009 Cost

Space Type	FY09 Allocation	FY09 Actual	Deficit/Surplus
RCC	\$16,080,940	\$17,356,182	(\$1,275,242)
LCO	\$216,654,782	\$220,927,037	(\$4,272,255)
Total	\$232,735,722	\$238,283,219	(\$5,547,497)

Source: Financial Management Report

5.15.3 Fiscal Year 2010

The spending plan and actual expenses for the RCCs were close, and the Census Bureau can consider FY RCC rent costs accurate to within 2 percent of the allocation as shown in Table 5 below. The LCOs project was overspent \$2.6 million by the end of the FY due to two factors: 1) RWA obligations for OT-HVAC exceeded projections; and 2) overbilling by GSA for rent in FY 2010. The OT-HVAC issue is documented in greater detail within Section 5.15. Overbilling is tracked by the Census Bureau for each month incurred and reimbursement is sought from GSA. However, these overcharges were not reconciled until FY 2011 and FY 2012; the credits paid to the Census Bureau from GSA are reflected in the table below. The eventual reimbursements for the remaining overpayment of rent should be considered an offset of the actual expenses incurred during FY 2010, but will not be realized until FY 2012.

Table 5: Fiscal Year 2010 Cost

Space Type	FY10 Allocation	FY10 Actual	Deficit/Surplus
RCC	\$16,415,052	\$16,143,891	\$271,161
LCO	\$37,442,066	\$40,041,332	(\$2,599,266)
Total	\$55,857,118	\$56,185,224	(\$2,328,106)

Source: Financial Management Report

5.15.4 Fiscal Year 2011

During FY11 the LCO project had funds re-programmed to address a large anticipated surplus over the original allocation, resulting in an end of year surplus of \$101,838. As of this writing, no further rent bills are due, nor RWA/SWAs invoices expected. Reconciliation with GSA of a few open RWA obligations remains an issue to close. The Census Bureau has obligated RWA funds in FY 2010 and FY 2011 to cover these potential invoices. In addition, according to Census Bureau calculations, GSA owes the Census Bureau \$131,342 in LCO rent reimbursement as of October 2011. A small reimbursement is expected from DHS-FPS for the overpayment of security fees.

RCC monthly rent payments were reduced substantially in FY11 due to three factors: 1) TI amortization completed - which corresponded to the end of the firm term of the lease, 2) the RSF of the RCCs space was reduced considerably, with the planned RCC downsizing in the January to March 2011 period, and 3) the closeout of the PRAO. However, a large portion of the actual cost reduction is not reflected in table 6 below for FY 2011 actual values, because of GSA overbilling for RCC rent. Similar to the LCO overbilling issue highlighted above, the same situation affects a number of RCCs. The GSA inability to cease billing on schedule has resulted in approximately \$1 million in rent overpayments as of October 2011. Overbilling is tracked by the Census Bureau for each month incurred and reimbursement is sought from GSA. A number of RCC rent overcharges are reconciled, although the Census Bureau predicts the issue will not be completely resolved until FY 2012. The eventual reimbursements will offset the actual expenses incurred, but will not be realized until FY 2012. The rent overcharges have resulted in the Census Bureau “charging-back” a number of IPAC rent invoices received from GSA in the August – October 2011 period; an action that will continue until GSA reconciles with the Census Bureau. GSA is aware of our concern and indicated they will seek to address the matter as quickly as possible. Table 6 shows the planned and actual space cost spending for FY 2011.

Table 6: Fiscal Year 2011 Cost

Space Type	FY11 Allocation	FY11 Actual	Deficit/Surplus
RCC	\$10,890,452	\$10,701,314	\$189,138
LCO	\$8,608,368	\$8,497,530	\$110,838
Total	\$19,498,820	\$19,198,844	\$299,976

Source: Financial Management Report

5.15.5 Total 2010 Census Space Cost

Table 7 below shows the total allocation and cost of RCC and LCO space as follows:

Table 7: Total Cost for the 2010 Census Space Rent

Space Type	Total Allocation	Total Actual Cost*	Deficit/Surplus
RCC	\$58,273,182	\$59,006,944	(\$733,762)
LCO	\$266,505,216	\$271,771,486	(\$5,266,270)
Total	\$324,778,398	\$330,778,430	(\$6,000,032)

Source: Financial Management Report

In January 2011, the Census Bureau de-obligated FIN obligations and secured reimbursement of over \$23.9 million that was not spent, and which are reflected in the appropriate FYs the obligations were established. During FY 2012, the Census Bureau will reconcile final costs with GSA and DHS, seeking reimbursements where necessary, and funding final payments for occupancy of space. In addition, the Census Bureau is de-obligating RWA and SWA contracts funds that are no longer required.

5.16 How effective were the tools and aids provided for DID preparation?

Nearly all of the regional staff reported that the DID LCO Guide, supporting aids, and training sessions adequately prepared them to effectively design and layout LCO space. The process was improved between the ELCO and LCO phase, mainly by refining the guide and supporting aids.

In addition, prior to the start of the LCO phase (Phase 2), two training sessions for regional staff were conducted to complement the DID LCO Guide. The architect/contractor the Census Bureau hired for the 2010 Census conducted the training sessions.

5.17 How useful was the DID review process?

The DID review process was critical to ensure Census Bureau requirements were met. Seventy-five percent of the regional staff indicated they strongly or somewhat agreed the review process added value to the program. Regional staff indicated the review phase was much “smoother” and more efficient during the LCO phase (Phase 2) due to improvements in the guide, job aids and the addition of the on-site training. Regional staff identified a number of suggestions to further improve the process including: 1) establish a national contract for DID services, 2) conduct AutoCAD training for regional staff, and 3) removing/adding some level of detail to the DIDs.

5.18 Was additional training needed for the DID process?

The training was considered an effective complement to the DID Guide and the job aids created for the DID process. DID training was conducted during the initial Space Leasing Training. At the onset of the ELCO phase more detailed training was conducted via video teleconference, and during the LCO phase, two detailed single-day trainings were held for regional staff to prepare the DIDs.

5.19 Was LCO office space adequately designed to allow flexible movement of computers for various operations?

Regional feedback concerning the adequacy of the space design for the movement of computers was not specifically addressed. Instead, regional staff provided a more general assessment of LCO space flexibility and utilization. Ninety-one percent of the regional staff respondents considered the LCO space design “very effective to somewhat effective”. In addition, eighty-five percent of the respondents reported the managers’ space as “very adequate to somewhat adequate”. Features such as the desk arrangement – “the boat concept” – provided efficient space for staff including access to computers and workstations.

5.20 Did SFOs result in a competitive process? Were there more or fewer bidders than expected?

SFOs did result in a competitive process where circumstances allowed. In a number of markets only one bidder (Lessor) submitted a response to the solicitation (e.g., SFO). Determining whether or not the responses were expected is not predictable, but efforts by Census Bureau and GSA field staff were to encourage as many Lessors to respond as possible. Both Census Bureau and GSA expected a challenge in securing multiple bids for each LCO site due to the requirements of the Census Bureau. There were a number of reasons contributing to single responses in many markets, including: 1) stringent Census Bureau requirements, (i.e., security and electrical requirements), 2) short-term lease, and 3) lack of viable properties.

5.21 Was the SFO used for RCCs effective in meeting Census space requirements?

GSA was able to secure RCC space on time, but there were certain aspects of the SFO that presented challenges to securing the RCCs. Census Bureau preference was for “flex” office space, which is commercial/industrial-type space; however the area of consideration and the type and vacancy of office space available at the time, limited options for GSA. In a number of instances GSA was only able to secure “Class A” office space, which is standard office space, because no “flex” space was available. Distinguishing the difference between (TI) items and the Shell (Rent Rate) items was an issue in some cases. The rent cost was negotiated during the lease award phase and the TI costs during the post-lease award phase, causing further confusion in how these items were charged in the rent bill. This caused GSA to have to renegotiate the Shell costs with Lessors. In a few instances, the configuration of the building and/or available space required GSA and the Census Bureau to pursue alternatives to meet all of the necessary requirements, such as splitting our offices among multiple floors, securing additional space short-term during peak activity periods, locating storage areas in non-contiguous locations, and adding of lifts at loading docks to handle the volume of deliveries we receive.

5.22 Was the SFO used for the E/LCOs effective in meeting Census space requirements and management?

The general opinion of the regional staff was the SFO met most of their operational needs based on the opinion of 88 percent of such respondents. However, a number of respondents identified the following requirements as inadequately addressed: 1) telecommunication infrastructure – too technical and not clearly defined, 2) humidity/temperature sensors for the IDS not clearly specified, 3) OT-HVAC and utilities in general, and 4) parking.

5.23 Did the SFO adequately address overtime HVAC, restroom, janitorial service, and parking requirements?

Regional staff had mixed feedback on OT-HVAC, restrooms, and janitorial services requirements. They had the following recommendations:

- **OT-HVAC:** The Census Bureau needs an improved process for monitoring and tracking usage, along with an improved procedure for ordering it. It should remove the annual hourly estimate from the SFO to be replaced with a flat OT-HVAC rate and clarify utility charges.
- **Restrooms:** Some regional staff believed the guidelines were not necessary, others requested more detail on ratio of stalls. Overall, staff considered the guidelines well defined.
- **Janitorial services:** This was considered specific enough, but the Census Bureau should state that janitorial services are needed throughout the day and that penalties need to apply when service is not provided.

5.24 Was the Intrusion Detection System adequate for Census needs?

The Intrusion Detection System (IDS) met Census Bureau security requirements because its requirements in the SFO were very specific. However, there was significant variation in the design, system configuration, and training on use of the security system. Regional staff identified a number of suggestions for improving the design and installation of the system, including: 1) using a single installer nationwide, which would require a national contract, 2) providing a better definition of optional as opposed to mandatory devices, 3) providing better defined system specifications (e.g., type of system, placement and number of devices), 4) necessary compatibility requirements, 5) providing training on what the Census Bureau expected during installation, and 6) having the Lessor order the security system earlier to prevent opening delays.

5.25 Was sufficient training provided to the regional staff regarding the IDS?

According to 75 percent of the regional staff who attended the training, the IDS training provided by the IDS installer, “adequately – fully prepared” the LCO staff to use the IDS. A major concern identified was Census Bureau users were trained on key pad entry and basic arming/disarming of the system, but not on the intricacies of the system or dealing with false alarms and the DHS Mega Centers. Each vendor conducted ad hoc training, some provided users’ guides, others verbal instructions, and some hands-on training. The training should be consistent from one LCO to another, and include a users guide and access to a help desk contact.

5.26 Were office space security requirements met?

Most security requirements were met; the SFO was reviewed by the Department of Commerce’s Office of Security (OSY), and a number of on-site inspections were conducted by OSY to ensure the LCOs met the requirements. However, during the inspections, a number of small risks were identified in some LCO locations. One, for example, was the minimum light level for outside lighting that was not up to standard of the SFO at some LCOs. The Census Bureau determined in these cases that it provided enough lighting to provide safe travel for employees outside the building. During the ELCO phase an unknown number of sites installed incorrect humidity detection devices which had to be replaced because they did not adequately monitor humidity levels. This was due to a poorly worded requirement – instead of “humidity”, “moisture” was used. This was corrected in the LCO version of the SFO. In most instances risks were attributable to modifications and expansion to the OSY inspection process and not deficiencies in the original build-out and acceptance of the LCOs.

5.27 Did the security requirements complicate the timing and cost of space acquisition?

There were five cases in which the installation of the IDS delayed the acceptance of the space due to the Lessors not providing security early enough in the process, or lack of effort by the IDS installer to understand the set of requirements and coordinate with DHS’ Mega Center. The cost of the space acquisition increased due to the requirement to install IDS in each LCO. The costs varied from \$5,000 to \$20,000 and from location to location. Time impacts also depended on the level of sophistication and/or knowledge of the IDS installer. Census Bureau staff met with the Lessors to improve this process by having them order their IDSs early on to prevent delaying the opening of locations.

5.28 Was the telecommunications system adequate to meet Census needs? What challenges did regional staff have in ensuring adequate telecom infrastructure in the LCOs?

The telecommunications system met Census Bureau needs. The majority of regional respondents recommend a similar effort in 2020 based on their experience with the OCE deployment, related telecom infrastructure, and preparatory activities. Regional staff identified a number of telecommunication infrastructure challenges encountered including, 1) knowing when to extend the telecom demarcation for non-standard situations, 2) timely cooperation among local service providers, 3) Lessors’ inability to understand the SFO’s telecom requirements, 4) misunderstanding telecom terminology and definitions, and 5)

miscommunication with moving computers and phones where they were needed for each operation.

Regional staff provided suggestions for improving the telecom infrastructure and the process to ensure adequate telecommunications connectivity is in place, including: 1) improving communication between Census Bureau IT staff and the cabling contractor; 2) standardizing language and defining terminology, 3) allowing for a more flexible schedule with more regional input, 4) obtaining pictures of each type of equipment being installed to ensure adequate infrastructure is in place, and 5) obtaining diagrams of connections on service points to access the building.

5.29 Was sufficient flexibility designed into the space plans for the expansion and contraction of the various operations?

The Local Census Office Managers had a private office to perform their responsibilities and could conduct closed-door meetings with a few staff. A few aspects of the design the regions considered inadequate, included: 1) the noise level in the Recruiting area, 2) managers needed more privacy and space for conference table and chairs, and 3) more work space for the Field Operations and Quality Assurance areas; however this feedback was limited to a few respondents. Once Recruiting activities were fully operational, the noise level among the staff increased significantly, making it difficult to hear a phone conversation. Some form of sound mitigation would lessen the impact. Feedback from managers indicated some could use more meeting space, along with the opinion more Operation and Quality Assurance space was needed, although these positions were not held universally. The shared “boat” design allowed for enough employee workspace and expansion during field operations. After the design of the LCOs was created, it was determined that the Recruiting and Administration areas needed to be adjacent. Once the adjustment was made to accommodate this, operations flowed smoothly after the Recruiting phase ended and the day-to-operations in the Administration area increased.

5.30 Was sufficient training provided to regional staff to effectively manage day-to-day the offices after deployment?

Overall, regional staff were well trained. However, there were two areas of day-to-day facility management that were identified as needing improvement:

- 1) Better documenting, ordering, and tracking the OT-HVAC service; and
- 2) Better handling IDS false alarms and re-occurring problems related to the installation of the IDS devices. For example, the LCOMs should have been named the point of contact in the case of a false alarm and the alarm systems needed to be registered with the local police so that in the case of a false alarm, the police would know that the location was government occupied and therefore not bill us for it.

5.31 Did Field Division have the necessary subject matter experts (SME) available to provide program direction and oversight?

A number of current regional staff and former FLD employees who were hired as contractors, all with previous decennial experience, provided SME input to the program. SME input consisted of assistance with identifying useful tools/aids, guidance on process/contract/program navigation, technical writing, “hands-on” experience and perspective; their advisory roles were used extensively. SME input was a large contributor to the success of the program.

5.32 What improvements, if any, can be made to the closeout process?

Suggestions to conduct a dry run of a small sample of sites early in the decade to identify potential problems/issues in the closeout process would be beneficial. The Census Bureau needs to ensure stakeholders’ staff and sub-contractors are trained and clearly understand requirements and procedures. For example, Harris’ subcontractor’s asset recovery agents and technicians were unprepared and needed training on the closeout process. The Closeout team needs to review all documents released to stakeholders and subcontractors to ensure consistency and adequacy of documents/procedures among parties.

6. Related Assessments

Related assessments include: 2010 Logistics Program Assessment and the E/LCO IT Equipment Install/Deinstall Assessment.

7. Key Lessons Learned, Conclusions, and Recommendations

7.1 Lessons Learned

1. Establish contacts early in the space planning process.
(e.g., DHS, OSY, GSA, Census Bureau IT, ACSD, FLD, FIN)
2. Use contracts to support specialized services: architectural services/space planners, government leasing experience, technical writing.
3. Provide funding early in the decade for staff to research and develop requirements and to coordinate, procure, and establish offices for training development.
4. CCM space in the LCOs was underutilized.
5. Work with GSA early in the decade to define space requirements for SFOs. (The SFO for the 2010 Census was ambiguous in sections. The Census Bureau needs to define exactly what it requires and what it can do without as a concession to get an award).
6. Develop a basic floor plan for leased space where the space planners can work with the Lessors’ architects to develop design intent drawings for buildout space.

7. Work with GSA to maintain a current point of contact list for billing inquiries and problem resolution, including but not limited to, Telecommunications Ordering and Pricing System (TOPS) billing, IPAC, Rent On the Web (ROW), FPS, RWA and rent bills. GSA must include LCO numbers for tracking purposes.
8. Ensure GSA billing is timely and that adequate funds are available to account for GSA's inability to cease billing on schedule.
9. Review and determine how to improve obligating, tracking, and ensuring timely payment of space-related expenditures in order to reduce the over-obligation of rent and de-obligation of RWA/SWA funds.

7.2 Conclusions

The 2010 Census Space Leasing Program was a success and improved with each wave of office openings, as the following indicates:

- RCC Phase-7 of the 13 RCCs opened on time (this included the PRAO)
- ELCO Phase-140 of the 151 ELCOs opened on time
- LCO Phase-344 of the 344 LCOs opened on time

The Census Bureau took into consideration lessons learned from the experience and made adjustments to the LCO acquisition process. These changes resulted in a much smoother process and all LCOs opened on time.

7.3 2020 Recommendations

1. Use a space utilization assessment to define office layout and to increase efficiency if operational requirements change.
2. Work with GSA to streamline the space acquisition process, including the market survey form and the SFO. (Shorten time from site identification to lease execution)
3. Increase the dollar threshold limits to allow the Census Bureau to use a simplified lease for the SFO.
4. Establish interagency working groups to define space acquisition strategies for the 2020 Census.
5. The Census Bureau should contract its own architect for the design of leased space.
6. Provide the RCCs with the Auto Desk Design Review software or similar for basic functionality of DIDs and construction documents, (e.g., printing, viewing, sharing, and updating).
7. Early in the planning process identify and develop appropriate Interagency Security Committee (ISC) security requirements for temporary Census Bureau Offices, which includes ISC-recommended level of security.

8. The 2020 Census planners need to take into account or re-examine the policy being used, when developing preliminary 2020 budgets. A system to track the obligation of funds for rent and RWAs/SWAs by fiscal year, the payment of IPAC bills to GSA, and the timely de-obligation of residual funds in the obligations must be identified and implemented much earlier in the decennial cycle.
9. Early in the 2020 Census planning process, document the policy we are to follow concerning the requirement to obligate all rental funds for firm term rent at time of lease signing. This has a significant impact on budget planning, the amount of funds required, and in which FY the funds are required.

8. Acknowledgements

DMD would like to thank Field Division, Space Leasing Branch staff and the ACSD Space Leasing staff for their invaluable background information, feedback, and assistance in gathering the program information and metrics for this report.

9. References

- 2010 Census Detailed Operational Plan for Field Infrastructure Support Operation Group, March 9, 2009
- U.S. Field Division, (September 30, 2008); 2010 Census Operational Plan for the Field Infrastructure Operation Group
- Jacobs Facilities, Inc., January 10, 2007. Consolidated Report: A Summary of the Space Optimization Evaluation and Build-Out Value Analysis for Local Census Offices

Appendix A: Definitions

Term	Definitions
Area of Consideration	Delineated geographic location within the LCO boundary in which to look for LCO space, usually within a defined Congressional District
Occupancy Agreement	A written agreement descriptive of the financial terms and conditions under which GSA assigns, and a client agency occupies, the GSA-controlled space identified therein.
Market Survey	A field survey of the area of consideration for a lease requirement for the purpose of obtaining information on market conditions and the availability of suitable space. A market survey form is completed.
Solicitation of Offers	The SFO is the basis for the entire lease negotiation process and is part of the lease. The SFO contains the necessary information to enable all potential offerors an opportunity to gain a clear understanding of the Government’s requirements and ensure that all offers are reviewed against the same criteria.
Design Intent Drawing	Floor layout—Walls, doors, equipment, furniture, electrical, automation and telecommunication needs.

Appendix B: Roles and Responsibilities

Activities and Roles Space Acquisition for Regional Census Center (RCC) and Puerto Rico Area Office (PRAO)

Reviewed and updated by GSA, Census FLD HQ, and Census FDCA PMO staffs
September 5-7, 2006 Project Update Meeting at Virginia Crossings Resort
Last Updated on 9/8/06

STEP	ACTIVITY	CENSUS	GSA	FDCA PMO and Harris	POSITION RESPONSIBLE
1	Census and GSA agree to their respective roles in the processes involved with acquisition of space, arrangements for, and installation of voice / data telecommunication systems, the procurement and installation of security systems, and the acquisition and delivery of supplies, furniture, and equipment for Census Offices. The Census Bureau will be responsible to coordinate efforts between the FDCA Contractor and GSA.	X	X	X	<ul style="list-style-type: none"> • Census Regional Director (RD) • Assistant Regional Center Manager (ARCM) • GSA PBS • FLD DIV (HQ) • PMO and Harris
	1A) - Reach agreement as to the fees GSA will receive for their services for RCC space.	X	X		<ul style="list-style-type: none"> • FLD DIV (HQ) • GSA PBS
2	GSA assigns a Realty Project Manager to each RCC to perform activities specified in this document for GSA, as well as assist with other RCC space acquisition needs as warranted.		X		GSA Realty Project Manager

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STEP	ACTIVITY	CENSUS	GSA	FDCA PMO and Harris	POSITION RESPONSIBLE
3	Census Headquarters and the ROs develop and provide to GSA a list of government agencies that Census cannot be co-located with per the Census Bureau's National Location Policy.	X			<ul style="list-style-type: none"> • Census RD / ARCM • FLD DIV (HQ)
4	Each RCC delineates the preferred area of consideration for the location of Regional Census Centers.	X			<ul style="list-style-type: none"> • RD • ARCM
5	Census and GSA negotiate / establish arrangements for the reimbursement to GSA for supplies, furniture, non-automation equipment, and other materials as needed, that are obtained through GSA schedules and contracts and for government-controlled and leased privately-owned space. (Funding is / will be established for GSA to bill Census through National Inter Agency Agreement (IAA), or other to be determined)	X	X		<ul style="list-style-type: none"> • Census (HQ) FLD DIV • NPC
6	HQ FLD provides the GSA Realty Project Manager with special and unique requirements for RCC space and the square footage requirements	X	X		HQ Census Leasing Spec (LS)
7	Census receives requirements from Homeland Security and writes them into special requirements for SFO.	X			Census (HQ) FLD DIV

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STEP	ACTIVITY	CENSUS	GSA	FDCA PMO and Harris	POSITION RESPONSIBILITY
8	Census and the FDCA PMO as appropriate prepare specifications for data and voice telecommunication lines to the RCCs and for any telecommunication service required to run on these lines, video teleconferencing and any direct service for security systems, fax machines, and so forth. Note: See RCC / LCO Telecommunications Roles and Responsibilities document	X		X	Census (HQ) FLD DIV
	8A) - In the event GSA FTS is used for telecommunications, a separate billing account will be established for all Decennial telecommunication services, FTS will be used for 2 required analog lines for the security system.	X		X	Census(HQ) FLD DIV
9	GSA identifies and evaluates government-controlled space in their inventory that is within the area of consideration of each RCC within 10 business days; that meets the Census Bureau's minimum requirements for government controlled space and sends the results to the RO.		X		GSA / PBS Regional Office
10	The Census Bureau and Census Bureau Security Division review crime statistics, access to public transportation, and the proximity to food service vendors for the area where the offered government-controlled space is located, to assist in making a decision to accept or reject the	X	X		<ul style="list-style-type: none"> • RO designee for space leasing • Census security office • GSA PBS

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STEP	ACTIVITY	CENSUS	GSA	FDCA PMO and Harris	POSITION RESPONSIBLE
	space offered.				
11	The RO and FDCA PMO and Harris as appropriate inspect and evaluate available government-controlled space offered by GSA, including access to and within the building for voice and data telecommunication lines using an evaluation form developed by Census for this purpose.	X		X	<ul style="list-style-type: none"> • Census RD / ARCM • RO designee for space / leasing • FDCA PMO • Harris
12	GSA provides floor plans, base rental rates, unit prices, and overtime HVAC rates in writing for offered government-controlled space at time of inspection.		X		GSA PBS (RS)
13	The RO approves or rejects the offered government-controlled space within 10 business days of inspection.	X			Census RO Team
14	If the offered government-controlled space is approved by the RO:	X			Census RO Team

**Activities and Roles
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STEP	ACTIVITY	CENSUS	GSA	FDCA PMO and Harris	POSITION RESPONSIBLE
	14A) - GSA prepares and provides an Occupancy Agreement to the RO within 10 business days.		X		GSA PBS Real Property - Contracting Officer (CO)
	14B) - The RO and HQ review and HQ signs this agreement within 10 additional business days (30 days from inspection).	X			ACSD
15	<p>The GSA / RO and FDCA PMO / Harris prepare and furnish preliminary demolition and construction (design-intent) drawings for the offered government-controlled space to GSA within 45 business days of inspection.</p> <p>Note: A DID document is available, but separate work needs to be done on special colors and special symbols for the DID.</p>	X	X	X	<p>GSA Regional Director designa LEAD Person in R</p> <ul style="list-style-type: none"> • FLD Space Leasing Tea • Harris (Rob Soper) • GSA as needed (Denise

**Activities and Roles
Space Acquisition for Regional Census Center (RCC) and Puerto Rico Area Office (PRAO)**

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STEP	ACTIVITY	CENSUS	GSA	FDCA PMO and Harris	POSITION RESPONSIBLE
16	GSA provides the RO with construction cost estimates GSA are responsible for, outside the requirements of the FDCA contract, for the government controlled space demolition and / or construction within 10 business days of their receipt of the preliminary design intent drawings.		X		GSA PBS (RS)
	16A) Assuming no gov't controlled space, GSA issues a task order to bring on a broker.		X		GSA PBS (RS)
17	Assuming no government controlled space.....Census HQ - FLD verifies and reviews GSA's Solicitation for Offers (SFO) and provides an updated version that includes special requirements, a generic floor plan, and information from FDCA PMO / Harris as appropriate concerning specification for infrastructure to support automation (computers and telephone), for use in area of consideration where government controlled space is not available or rejected.	X			<ul style="list-style-type: none"> • Census(HQ) FLD DIV • FDCA PMO • Harris
18	GSA customizes the SFO based on market conditions.	X	X		<ul style="list-style-type: none"> • Census RCC Team • GSA (RS)

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STEP	ACTIVITY	CENSUS	GSA	FDCA PMO and Harris	POSITION RESPONSIBL
19	Assuming an SFO is submitted to GSA... Census reviews and provides comments to GSA in 5 business days on the SFO.	X	X		<ul style="list-style-type: none"> • Census RO Team • Census HQ Space Team • GSA PBS (HQ) TEAM
20	The RO may identify available privately-owned space that meets census requirements and provide suggestions to GSA	X	X		Census RO
21	The GSA and Census conduct a market survey (with RO input as needed) the lessor / broker for a potential property to schedule an inspection with a request to have a page-size or scaled floor plan available at the time of inspection.	X	X		<ul style="list-style-type: none"> • GSA PBS and / or Broker • Census RO Team
22	The GSA, with RO concurrence, issues SFOs with generic floor plans (SFO packages) to lessors / brokers of potential properties, requesting them to submit offers that meet or capable of meeting the special / unique requirements stated in the SFO, along with floor plan of their space.	X	X		<ul style="list-style-type: none"> • GSA (RS) • Census RO Team
23	The GSA receives offers from the lessors / brokers of potential properties and reviews them with the RO.	X	X		<ul style="list-style-type: none"> • GSA (RS) • Census RO Team

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STEP	ACTIVITY	CENSUS	GSA	FDCA PMO and Harris	POSITION RESPONSIBLE
24	The GSA schedules offer negotiations with those lessors / brokers of potential properties who submitted offers which are deemed by Census and GSA as being responsive.	X	X		<ul style="list-style-type: none"> • GSA PBS • Census RO Team
25	The GSA / Broker negotiate offers with the lessor / broker of each offered property in person or via telephone as appropriate. (RO presence at negotiations if requested)	X	X		<ul style="list-style-type: none"> • GSA PBS CO • Census RO Team
26	The GSA / Broker prepares and sends a final proposed revision (FPR) letter to the broker / lessor of each offered property, allowing 10 business days for a response.	X			<ul style="list-style-type: none"> • GSA (CO)
27	The GSA / Broker receives, reviews, and evaluates FPRs in consultation with the ROs	X	X		<ul style="list-style-type: none"> • GSA (CO) • Census (LS)
28	The RO and the GSA / Broker decide upon the offered property to be accepted for the RCC	X	X		<ul style="list-style-type: none"> • Census RCC Team • GSA PBS (CO)

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Space Acquisition for Regional Census Center (RCC) and Puerto Rico Area Office (PRAO)**

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STEP	ACTIVITY	CENSUS	GSA	FDCA PMO and Harris	POSITION RESPONSIBLE
29	The GSA prepares all the documentation required for the lease and obtains ALL NECESSARY LEGAL REVIEWS AND OPINIONS within 15 business days of the decision for a particular property.		X		GSA PBS (CO)
30	The GSA Contracting Officer provides an award OA to Census for approval and signature.	X	X		<ul style="list-style-type: none"> • Census RD • Chief, ACSD • GSA PBS
31	The GSA issues the award letter.		X		GSA PBS (CO)
32	The Census FLD HQ provides the FDCA PMO and TCO with the address of the RCC property for the ordering of T-1 service and ordering of analog lines.	X		X	<ul style="list-style-type: none"> • Census (LS) • Harris • FDCA PMO • TCO Census
33	The lessor's architect and GSA / broker develop design-intent drawings (using AutoCAD) for the selected space based on the generic floor plan submitted with the SFO and with RO direction and GSA assistance and / or Harris assistance as needed.	X	X		<ul style="list-style-type: none"> • Census (LS) • GSA PBS (RS) and / or Broker

Activities and Roles
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Last Updated on 9/8/06

STEP	ACTIVITY	CENSUS	GSA	FDCA PMO and Harris	POSITION RESPONSIB
34	The RO and / or FDCA PMO and FDCA contractor(s) develop copies of the design-intent drawings for the selected space to accommodate the voice and data telecommunication lines, telephone service arrangements, and electrical.	X	X	X	<ul style="list-style-type: none"> • Census (LS) • GSA PBS -Space Plann other • FDCA PMO
35	The FDCA contractor(s) orders the data and voice telecommunication lines for the LCO.	X		X	Census RCC Team / FDC
36	The GSA negotiates with the lessor for a mutually-acceptable schedule and costs for modifications to the RCC space as specified by the lease and included in the design-intent drawings.	X	X		GSA PBS Project Manage (PM)
37	Hold a pre-construction meeting with GSA and Census and other parties TBD after January 2007, Note: See RCC / LCO Telecommunications Roles and Responsibilities DRAFT document for details.	X	X		Census RCC Team / FDC

**Activities and Roles
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Last Updated on 9/8/06**

STEP	ACTIVITY	CENSUS	GSA	FDCA PMO and Harris	POSITION RESPONSIB
38	The GSA conducts periodic inspections (with Census participation) reflecting buildout milestones to ensure that modifications are being made as agreed upon and will be completed on schedule, taking follow up actions as appropriate. (The GSA will request, as necessary, that the GSA / Broker participate in these inspections to ensure that technical details related to fire safety, air quality, HVAC, lighting, and ADA issues are being properly addressed.)	X	X		<ul style="list-style-type: none"> • Census (LS) • GSA PBS (RS) and or F Representative for Prop
39	Census HQ (working with RO) determines furniture and equipment requirements nationally for the RCC; Census NPC orders furniture and non-automation equipment and specifies distribution working through Census HQ.	X			<ul style="list-style-type: none"> • Census (FLD DIV HQ) • National Processing Ce (NPC)
40	The GSA / Broker with the ROs, and FDCA contractor(s) as needed, conducts acceptance inspections, including security system inspection, and prepares punch-list when notification is received from the lessor that buildout (construction) has been completed or substantiated.	X	X		<ul style="list-style-type: none"> • Lessor • Census (LS) • GSA PBS (RS) and / or Broker
41	When the space is accepted for occupancy, the GSA / RO receives the keys to the RCC space from the lessor with GSA approval.	X			Census (LS)

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Space Acquisition for Regional Census Center (RCC) and Puerto Rico Area Office (PRAO)**

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Last Updated on 9/8/06**

STEP	ACTIVITY	CENSUS	GSA	FDCA PMO and Harris	POSITION RESPONSIB
42	GSA provides Census with final OA and billing commences.		X		GSA PBS (RS)
43	Harris and FDCA PMO and / or telecommunications vendor installs the data and voice telecommunication lines to the point-of-presence (POP) in the building (may be done simultaneously with site modifications). This is a 2-step process: Step 1: lines to POP (generally in basement) Step 2: lines to census space Note: See RCC / LCO Telecommunications Roles and Responsibilities DRAFT document for details.	X		X	<ul style="list-style-type: none"> • Harris • FDCA PMO
44	Harris and FDCA PMO install the computing hardware and the essential network cabling to support telephones and computers within the RCC and verify all equipment, telephone systems are functioning according to agreed upon requirements.	X		X	<ul style="list-style-type: none"> • Census (LS) • Harris • FDCA PMO

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STEP	ACTIVITY	CENSUS	GSA	FDCA PMO and Harris	POSITION RESPONSIBLE
45	The RO notifies the vendors that received negotiated contracts from GSA schedule for furniture and non-automation equipment, that the RCC is ready to receive furniture and non-automation equipment (notification may be automated).	X			Census (LS) or other
46	The RO notifies NPC that the RCC is ready to receive supplies.	X			Census (LS) or other
47	The RO through the GSA uses the lease to work with the lessor to ensure that the conditions of the lease are met and that the RCC operates as efficiently and trouble free as possible. (lease administration)	X	X		<ul style="list-style-type: none"> • GSA PBS • Census RCC Team
48	The RCC notifies GSA and FDCA PMO 120 days prior to implementation of space reduction.	X			Census (LS)
49	RCC notifies FPS of disabling part of space.	X			Census (LS)
50	The RCC arranges for FDCA PMO to pick up IT equipment at the implementation of space reduction.				Census (LS)

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STEP	ACTIVITY	CENSUS	GSA	FDCA PMO and Harris	POSITION RESPONSIBLE
51	The RCC arranges for vendors to pick up furniture and non-automation equipment at the implementation of space reduction.	X	X		<ul style="list-style-type: none"> • Census RCC Team • GSA PBS Regional Team
52	The RCC notifies GSA PBS, FTS, and FDCA PMO 90 days prior to final close out				<ul style="list-style-type: none"> • Census RCC Team • GSA PBS Regional Team
53	The RCC arranges for FDCA PMO to pick up IT equipment at the final closing.	X		X	<ul style="list-style-type: none"> • Census (LS) • FDCA PMO • Harris
54	The RCC arranges for vendors to pick up furniture and non-automation equipment at the close of operations in agreement with the contracts negotiated.	X			Census (LS)
55	RO to verify RCC space is "broom-clean."	X			Census RO Team
56	RO, GSA, and FDCA PMO (if needed) conduct a final walk through inspection and complete a "Condition Survey Report."	X	X		<ul style="list-style-type: none"> • Census RO Team • GSA PBS • Lessor / Broker

APPENDIX C: RCC and PRAO Roles and Responsibilities

Step	Activity	Census	GSA	Equis Broker (Broker)	FDCA PMO and Harris	Position Responsible	Remarks (dates, actions)
1	Census, FDCA PMO, Harris, GSA and Equis Broker agree to their respective roles in the processes involved with acquisition of space, arrangements for, and installation of voice / data telecommunication systems, the procurement and installation of security systems, and the acquisition and delivery of supplies, furniture, and equipment for Census Offices. The Census Bureau will be responsible to coordinate efforts between the FDCA Contractor and GSA / Broker.	X	X	X	X	Census Regional Director (RD), Assistant Regional Census Manager (ARCM), GSA PBS, Equis Broker, FLD DIV (HQ), FDCA PMO and Harris	
	1A) - GSA reach agreement as to the fees Equis Broker will receive for their services for LCO space.		X	X		GSA PBS, Equis Broker	
2	GSA assigns a Regional Realty Project Manager to each RCC to perform activities specified in this document for GSA / Broker to coordinate with Census, as well as assist with other LCO space acquisition needs as warranted.	X	X	X		GSA Realty Project Manager	

Step	Activity	Census	GSA	Equis Broker (Broker)	FDCA PMO and Harris	Position Responsible	Remarks (dates, actions)
3	Census and GSA FAS negotiate / establish arrangements for the reimbursement to GSA for supplies, furniture, non-automation equipment, and other materials as needed, that are obtained through GSA schedules and contracts and for government-controlled and leased privately-owned space. (Funding is / will be established for GSA to bill Census through National Inter Agency Agreement (IAA), or other to be determined)	X	X			Census (HQ) FLD DIV, NPC, GSA FAS	NPC is going through GSA supply schedule
4	HQ FLD provides the GSA PBS HQ (Central Office) Team with special and unique requirements for LCO space and square footage requirements	X	X			Census (HQ) FLD DIV	
5	Census receives requirements from Homeland Security and writes them into special requirements for SFO.	X	X			Census (HQ) FLD DIV, DHS / FPS, GSA PBS HQ Team (Central Office)	

Step	Activity	Census	GSA	Equis Broker (Broker)	FDCA PMO and Harris	Position Responsible	Remarks (dates, actions)
6	Census and the FDCA PMO as appropriate prepare specifications for data and voice telecommunication lines to the LCOs and for any telecommunication service required to run on these lines, video teleconferencing and any direct service for security systems, fax machines, and so forth. Note: See RCC / LCO Telecommunications Roles and Responsibilities document	X			X	Census (HQ) FLD DIV, FDCA PMO, Harris	Specs go from FDCA to Census to GSA
	6A) - In the event GSA FAS is used for analog service (as needed for security system), a separate billing account will be established for all Decennial telecommunication services, FTS will be used for 2 required analog lines for the security system.	X	X			Census(HQ) FLD DIV, GSA FAS	
7	Census FLD HQ (working with ROs) decides on TEAs, numbers of LCOs, and types / numbers of LCOs by RCC.	X				Census (HQ) FLD DIV, RD	
8	ROs use delineation guidelines and parameters from Census FLD HQ to delineate final boundaries for LCOs in their respective RCC areas.	X				RD, ARCM, RO/RCC Geographers	

Step	Activity	Census	GSA	Equis Broker (Broker)	FDCA PMO and Harris	Position Responsible	Remarks (dates, actions)
9	For each delineated LCO area, the RO determines the specific boundaries within which the space should be located (the preferred areas of consideration for location of LCOs).	X				RD, ARCM	
10	GSA identifies and evaluates government-controlled space in their inventory that is within the preferred area of consideration of each LCO within 10 business days; that meets the Census Bureau's minimum requirements for government controlled space and sends the results to the RCC.		X			GSA PBS Regional Office	
11	The Census Bureau and Census Bureau Security Division review crime statistics, access to public transportation, and the proximity to food service vendors for the area where the offered government-controlled space is located, to assist in making a decision to accept or reject the space offered.	X	X			RCC designee for Space Leasing, Census Security Office, GSA PBS	

Step	Activity	Census	GSA	Equis Broker (Broker)	FDCA PMO and Harris	Position Responsible	Remarks (dates, actions)
12	The RCC and FDCA PMO and Harris as appropriate inspect and evaluate available government-controlled space offered by GSA, including access to and within the building for voice and data telecommunication lines using an evaluation form developed by Census for telecommunications compliance.	X	X		X	RD, ARCM, RCC designee for Space Leasing, FDCA PMO, Harris, GSA PBS	
13	GSA provides floor plans, base rental rates, unit prices, and overtime HVAC rates in writing for offered government-controlled space at time of inspection.		X			GSA PBS Realty Specialist	
14	The RCC approves or rejects the offered government-controlled space within 10 business days of inspection.	X				Census RCC Team	
15	If the offered government-controlled space is approved by the RCC:	X				Census RCC Team	
	15A) - GSA prepares and provides an Occupancy Agreement to the RCC within 10 business days.		X			GSA PBS Real Property Contracting Officer (CO)	
	15B) - The RCC review and signs this agreement within 10 additional business days (30 days from inspection).	X				RD, ARCM	

Step	Activity	Census	GSA	Equis Broker (Broker)	FDCA PMO and Harris	Position Responsible	Remarks (dates, actions)
16	The GSA PBS, RCC Space Team, and FDCA PMO / Harris prepare and furnish preliminary demolition and construction (design-intent) drawings for the offered government-controlled space to GSA within 30-45 business days of inspection.	X	X		X	GSA PBS Regional Office, Census Space Leasing Representative, FDCA PMO, Harris,	
17	GSA provides the RCC with construction cost estimates GSA are responsible for, outside the requirements of the FDCA contract, for the government controlled space demolition and / or construction within 10 business days of their receipt of the preliminary design intent drawings.		X			GSA PBS Realty Specialist	
18	Assuming no government controlled space, GSA issues a task order to bring on an Equis Broker.		X	X		GSA PBS Regional Office, Equis Broker	
19	GSA / Broker advertises for LCO office space, conducts informal market surveys, and holds informal discussions with potential offerors.		X	X		GSA / Broker (GSA must approve all ads.)	An advertisement is not required for ELCOs and LCOs due to their size, but may be used on occasion where a contracting officer (CO) feels it is necessary for competition purposes.

Step	Activity	Census	GSA	Equis Broker (Broker)	FDCA PMO and Harris	Position Responsible	Remarks (dates, actions)
20	RCCs may identify available privately-owned properties as candidates for LCO office space and will share them with GSA / Broker.	X	X	X			
21	The RCC Space Leasing Representative and GSA / Broker gathers market information through local contacts.	X	X	X		Census RCC	
22	Census Space Leasing Representative and GSA / Broker customizes the SFO to reflect market conditions, as necessary.	X	X	X		Census Space Leasing Representative, GSA / Broker	
23	GSA / Broker conducts a formal market survey (with RCC input as needed) and contacts the lessor / broker for a potential property to schedule an inspection with a request to have a page-size or scaled floor plan available at the time of inspection.	X	X	X		GSA / Broker, Census Space Leasing Representative	
24	GSA / Broker, with RCC concurrence, issues SFOs with generic floor plans (SFO packages) to lessors / brokers of potential properties, requesting them to submit offers that meet or are capable of meeting the special / unique requirements stated in the approved SFO, along with floor plan of their space.	X	X	X		GSA / Broker	

Step	Activity	Census	GSA	Equis Broker (Broker)	FDCA PMO and Harris	Position Responsible	Remarks (dates, actions)
25	GSA / Broker receives offers from the lessors / brokers of potential properties and briefly reviews them with the RCC.	X	X	X		GSA / Broker, Census Space Leasing Representative	
26	GSA / Broker schedules offer negotiations with those lessors / brokers of potential properties who submitted offers which are deemed responsive by GSA.			X		GSA / Broker	
27	GSA / Broker negotiate offers with the lessor / broker of each offered property in person or via telephone as appropriate.	X	X	X		GSA / Broker, Census Space Leasing Representative	
28	GSA / Broker prepares and sends a final proposed revision (FPR) letter to the broker / lessor of each offered property, allowing 10 business days for a response.		X	X		GSA / Broker	
29	GSA / Broker receives, reviews, and evaluates FPRs. Consults with Census on determination.	X	X	X		GSA / Broker, Census Space Leasing Representative	
30	The RCC and the GSA / Broker decide upon the offered property to be accepted for the LCO.	X	X	X		GSA / Broker, Census Space Leasing Representative	

Step	Activity	Census	GSA	Equis Broker (Broker)	FDCA PMO and Harris	Position Responsible	Remarks (dates, actions)
31	GSA / Broker prepares all the documentation required for the lease and obtains ALL NECESSARY LEGAL REVIEWS AND OPINIONS within 15 business days of the decision for a particular property.		X	X		GSA / Broker, GSA PBS Real Property Contracting Officer (CO)	
32	The GSA Contracting Officer provides an award OA to Census for approval and signature.	X	X			GSA PBS Real Property Contracting Officer (CO), RD, Census Space Leasing Representative	
33	GSA issues Lease Document.		X			GSA PBS Real Property Contracting Officer (CO), or designee	
34	The Census Space Leasing Representative provides the FDCA PMO and Harris (via GEKO) with the address of the LCO property for the ordering of T-1 service. If needed, Census will need to work with GSA FAS and/or outside vendor to order analog lines for Security system.	X	X		X	Census Space Leasing Representative, FDCA PMO, Harris, GSA FAS,	

Step	Activity	Census	GSA	Equis Broker (Broker)	FDCA PMO and Harris	Position Responsible	Remarks (dates, actions)
35	The lessor's Architect / Space Planner, Equis Broker, RCC staff, FDCA PMO, and Harris develop design-intent drawings (using AutoCAD) for the selected space based on the generic floor plan submitted with the SFO and with RCC direction and GSA assistance and / or Harris assistance as needed.	X	X	X	X	Census RCC Team, Equis Broker, FDCA PMO, Harris, Lessor's Architect / Space Planner	
36	The RCC and / or FDCA PMO and FDCA contractor(s), and Lessor's Architect / Space Planner develop copies of the design-intent drawings for the selected space to accommodate the voice and data telecommunication lines, telephone service arrangements, and electrical.	X			X	Census RCC Team, FDCA PMO, Harris, Lessor's Architect / Space Planner	
37	The FDCA contractor(s) orders the data and voice telecommunication lines for the LCO.				X	FDCA PMO, Harris	
38	GSA / Broker negotiates with the lessor for a mutually-acceptable schedule and costs for tenant improvements to the LCO space as specified by the lease and included in the design-intent drawings.		X	X		GSA / Broker	

Step	Activity	Census	GSA	Equis Broker (Broker)	FDCA PMO and Harris	Position Responsible	Remarks (dates, actions)
39	A pre-construction meeting with GSA / Broker, Lessor, General Contractor, Census and other parties prior to start of build-out activities in the leased space.	X	X	X	X	Census RCC Team, Equis Broker, FDCA PMO, Harris, Lessor's Architect / Space Planner, General Contractor	
40	GSA / Broker conducts periodic inspections (with Census Space Leasing Representative participation) reflecting buildout milestones to ensure that tenant improvements are being made as agreed upon and will be completed on schedule, taking follow up actions as appropriate. (GSA / Broker will participate in these inspections to ensure that technical details related to fire safety, air quality, HVAC, lighting, and ADA issues are being properly addressed.)	X	X	X		GSA / Broker, Census Space Leasing Representative	
41	Census HQ (working with RCC) determines furniture and equipment requirements nationally for the LCO; Census NPC orders furniture and non-automation equipment and specifies distribution working through Census HQ. Census required to keep GSA and Broker in the loop	X				Census HQ, NPC	

Step	Activity	Census	GSA	Equis Broker (Broker)	FDCA PMO and Harris	Position Responsible	Remarks (dates, actions)
	concerning final decisions and timing.						
42	GSA / Broker with the Census Space Leasing Representative conducts acceptance inspections, including security system inspection, and prepares punch-list when notification is received from the lessor that buildout (construction) has been completed or substantiated.	X	X	X		GSA / Broker, Census Space Leasing Representative	
43	When the space is accepted for occupancy, GSA / Broker, and Census Space Leasing Representative receives the keys to the LCO space from the lessor with GSA approval.	X	X	X		GSA / Broker, Census Space Leasing Representative	
44	GSA provides Census with final OA for signature and billing commences.	X	X			GSA , RD, Census Space Leasing Representative	

Step	Activity	Census	GSA	Equis Broker (Broker)	FDCA PMO and Harris	Position Responsible	Remarks (dates, actions)
45	<p>Harris and FDCA PMO and / or telecommunications vendor installs the data and voice telecommunication lines to the point-of-presence (POP) in the building (may be done simultaneously with site modifications). This is a 2-step process: 1) lines to POP (generally in basement), 2) lines to Census Space. Note: See RCC / LCO Telecommunications Roles and Responsibilities DRAFT document for details. Done in coordination/consultation with Census and GSA / Broker.</p>	X	X	X	X	FDCA PMO, Harris	
46	<p>Harris and FDCA PMO install the computing hardware and the essential network cabling to support telephones and computers within the LCO and verify all equipment, telephone systems are functioning according to agreed upon requirements.</p>				X	FDCA PMO, Harris	
47	<p>The Census Space Leasing Representative (or other designee) notifies the vendors that received negotiated contracts from GSA schedule for furniture and non-automation equipment, that the LCO is ready to receive furniture and non-</p>	X				Census Space Leasing Representative, or other designee	

Step	Activity	Census	GSA	Equis Broker (Broker)	FDCA PMO and Harris	Position Responsible	Remarks (dates, actions)
	automation equipment (notification may be automated).						
48	The Census Space Leasing Representative (or other designee) notifies NPC that the LCO is ready to receive supplies (notification may be automated).	X				Census Space Leasing Representative, or other designee, NPC	
49	Ongoing monitoring of activities for space acquisition, buildout, and occupancy: For the steps above, Equis Broker, GSA PBS, Census FLD HQ, RCC, and FDCA PMO will monitor all activities and prepare regular progress reports (reports may be automated) for Chief, Field Division, and other as needed.	X	X	X	X	GSA PBS, Equis Broker, RCC Space Team, Census FLD HQ, FDCA PMO,	
50	Lease administration activities while the space is occupied for census operations: The RCC and LCO staff through GSA will use the lease to work with the Lessor to ensure that the conditions of the lease are met and that the LCO operates as efficiently and trouble free as possible	X	X			GSA Realty Specialist, RCC Space Team, LCO Mgmt.	

Step	Activity	Census	GSA	Equis Broker (Broker)	FDCA PMO and Harris	Position Responsible	Remarks (dates, actions)
51	The RCC notifies GSA Realty Specialist, Real Property Contracting Officer, DHS/FPS, and FDCA PMO, Harris 90 days prior to LCO close out.	X	X		X	GSA PBS, RCC Space Team, Census FLD HQ, FDCA PMO, Harris	
52	The RCC arranges for FDCA PMO / Harris to pick up IT equipment at the final closing.	X			X	Census Space Leasing Representative, FDCA PMO, Harris	
53	The RCC and / or LCO arranges for vendors to pick up furniture and non-automation equipment at the close of operations in agreement with the contracts negotiated.	X				Census Space Leasing Representative, or other designee	
54	RCC and / or LCO verify LCO space is "broom-clean."	X				Census Space Leasing Representative, or other designee, LCO Mgmt.	
55	RCC and / or LCO, GSA Realty Specialist, and Harris (if needed) conduct a final walk through inspection and complete a "Condition Survey Report."	X	X		X	Census RCC Team, LCO Mgmt., Harris,	