

# APPENDIX B: Lease File Checklists

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1. Overview ∉

## 1. Overview

a. PricewaterhouseCoopers LLP (PwC) prepared an FY 2000 Management Letter under contract to the Office of Inspector General (IG) that addressed leasing. The leasing matter was included in the IG's Report Number A001012/B/F/F01012 and transmitted by the Regional Inspector General for Auditing to the Acting Commissioner on May 29, 2001.

b. PwC "reviewed the leasing files to ensure the files were properly documented" and found some "discrepancies." A small percentage of the files did not include either copies of newspaper advertisements or price negotiation documentation. Accordingly, the report recommended that PBS "Establish a standardized contract file format in accordance with the GSAM so that individual pieces of documentation can be located more easily." PBS management agreed with the recommendation and, in October 2001, issued guidance to Leasing Specialists instructing them to use the lease file checklist to organize lease files and to include the lease file checklist in the lease file. In addition, PBS provided a guidance document to be used in coordination with the Checklist and that explains the policy requirements for each task.

c. In June 2012, the GSA PBS Office of Leasing issued templates for Request for Lease Proposals (RLP) and Lease for the models that were developed through the PBS Lease Reform initiative. Lease models have tailored the lease acquisition documents to the size, complexity, and security level of the lease transaction. This includes dividing the solicitation for offers into two documents, a Request for Lease Proposals (RLP) and Lease for each model except the On-Airport model that does not use an RLP.

The five models are:

- Simplified Lease Acquisition Model
- Streamlined Lease Model
- Succeeding Lease, Superseding Lease Model
- Standard Lease Model
- On-Airport Lease Model

### 2. Lease File Checklists

This appendix establishes lease file checklists for the following leasing models:

- Simplified Lease Acquisition Model
- Streamlined Lease Model
- Succeeding Lease, Superseding Lease Model
- Standard Lease Model
- On-Airport Lease Model

These checklists provides a reference point for all tasks/documentation necessary to complete a lease acquisition and should be used in coordination with the Leasing Desk Guide, which explains the policy requirements for each task. (Note: In the near future, the GSA PBS Office of Leasing will be incorporating live hyperlinks from the specific line items in following lease file checklist to the appropriate Leasing Desk Guide section providing policy guidance on that specific line item.)



# a. Simplified Lease Acquisition Model

Agency:	
Location:	
Square footage:	
Project number:	
OA number:	
Lease number:	
Contracting officer:	
Leasing Specialist/RGA:	
Project manager:	
NBC agent:	
Broker contract number:	
Task order number:	
Phone number:	
Type of lease action:	Simplified

				Document
I. –	REQUIREMENTS DEVELOPMENT	Required	Note	in File
Α.	SF-81 or Other Request for Space			
В.	Requirements Development Documentation (TMP,			
	Needs Interview Checklist, gPM Documentation,			
С.	Agency Specific Requirements (ASR) and Design			
	Schematic			
D.	GSA Pricing of TI Costs to Confirm Within TI			
	Allowance			
E.	Vacant Federal Space Check			
F.	Delineated Area			
G.	Rural Development Act Compliance			
Η.	Justification of Delineated Area Outside CBA			
1.	Notification to City Official			
J.	Notification to Field Office re: Lease Expiration			
Κ.	Notification to FPS to Request the FSL			
	-FSL Determination and Security Requirements			
L.	Initial Scoring Worksheets for Lease Term >5 Years			
Μ.	Draft OA with Simplified Clauses			
Ν.	SLAT Project Management & Acquisition Plan or			
	File Documentation			
0.	Project Milestone Schedule			
Ρ.	National Broker Contract Task Order Documentation			
Q.	Other			



### a. Simplified Lease Acquisition Model &

		Demuland	Nata	Document
II.	PRE-SOLICITATION PHASE	Required	Note	in File
A. B.	Task Order / Project Orientation Meeting Minutes Procurement Summary/FedBizOpps Advertisement			
D.	· · · ·			
C.	and Responses Market Survey, Market Survey Report, and Agency			
0.	Concurrence			
D.	Lack of Competition Memorandum for File			
E.	Historic Preservation Compliance Check			
E.	Flood Plain Check			
G.	NEPA Compliance			
<u>.</u> Н.	Other			
11.	Oulei			Document
Ш.	SOLICITATION PHASE	Required	Note	in File
Α.	Draft RLP Package, including Lease, Special			
	Requirements, and Security Standards			
В.	Technical Review of Draft RLP and Draft Lease			
C.	Agency Approval of Draft RLP and Draft Lease			
D.	RLP Package Distribution List			
E.	Final RLP Package with Attachments			
F.	Cover Letter and Procurement Summary Form			
G.	Transmittal of Final RLP Package to Agency, GSA			
	Field Office and FPS			
H.	Amendments to RLP Package			
- I.	Correspondence with Offerors Prior to Receipt of			
	Proposals			
J.	Other			
				Document
IV.	PRE-NEGOTIATION/EVALUATION OF OFFERS	Required	Note	in File
Α.	Negotiation Objectives			
В.	Competitive Range Determination/ Notification			
C.	Seismic Review			
D.	Fire Protection & Life Safety Review of Prelease			
	Submittals			
E.	Request for Contractor Support Services for Lease			
	Acquisition (e.g. CQM, Furniture Vendors, Etc.)			
F.	Other			

### ${\ensuremath{\,\textcircled{\tiny \ensuremath{\,\swarrow}}}}$ a. Simplified Lease Acquisition Model

				Document
٧.	UNSUCCESSFUL OFFER(S)	Required	Note	in File
А	Initial Offer and Related Correspondence			
В.	Abstract of Offers			
C.	Scaling/Measurement of Offered Space Floor Plans			
D.	Initial Offer Present Value Analysis (PVA) Evaluation			
E.	Notice of Deficiencies/Discussions/Negotiations			
F.	Revised Offer and Related Correspondence			
G.	Request for Final Proposal Revision			
Η.	Final Offer and Related Correspondence			
l. –	Final Offer Present Value Analysis (PVA) Evaluation			
J.	Pre-Award Notice and Rejection Letters			
Κ.	Post-Award Notice and Rejection Letters			
L.	Post-Award Debriefings/Protests and			
	Resolution/Congressional Inquiries and Responses			
М.	Other			
	SUCCESSFUL OFFER AND AWARD			Document
VI.	DETERMINATION	Required	Note	in File
А	Initial Offer and Related Correspondence			
В.	Abstract of Offers			
C.	Scaling/Measurement of Offered Space Floor Plans			
D.	Initial Offer Present Value Analysis (PVA) Evaluation			
E.	Notice of Deficiencies/Discussions/Negotiations			
F.	Revised Offer and Related Correspondence			
G.	Request for Final Proposal Revision			
H.	Final Offer and Related Correspondence			
- I	Final Offer Present Value Analysis (PVA) Evaluation			
J.	Price Negotiation Memorandum			
K.	Final Scoring Evaluation or Scoring Memorandum			
L.	Seismic Certification			
Μ.	Flood Plain Compliance			
Ν.	Responsibility Check			
	-Central Contractor Registration (CCR) Information			
	via SAM			
	-Excluded Parties List Service (EPLS) via SAM			
	—Past Performance			
	—Financial Responsibility			
О.	Energy Star Compliance/ Cost Effective Energy			
	Efficiency Upgrades			
Ρ.	Approved Small Business Subcontracting Plan			
Q.	Offeror's Proof of Authority and Ownership			
R.	Other			



### a. Simplified Lease Acquisition Model ${\ensuremath{\$

VII.				Document
(A)	APPROVAL AND FUNDING DOCUMENTS	Required	Note	in File
Α.	Agency Recommendation Letter (From GSA) and			
	Revised OA Signed by Agency			
В.	Receipt of RWA and Required Certification for Turn-			
	key TI Above Allowance			
C.	BA 53 Fund Certification			
D.	Legal Review and Comment			
E.	Other			
VII.		Demined	Nata	Document
(B)	LEASE	Required	Note	in File
A.	Executed Lease Transmittal Letter			
B.	Fully Executed Lease			
C.	Lease Amendment(s)			
D.	Delivery Confirmation of Lease to Lessor			
E.	Other			Decument
VIII.		Doguirod	Noto	Document in File
	POST AWARD NOTIFICATIONS	Required	Note	in File
A. B.	Post Award Synopsis Copy of Correspondence Transmitting Lease to			
D.	Field Office			
С	Copy of Correspondence Transmitting Lease to			
	Agency			
D	Copy of Correspondence Transmitting Lease to FPS			
E.	Request to GSA PMC/Field Office for Utility Contract			
F.	Other			
		I		Document
IX.	POST AWARD	Required	Note	in File
Α.	Drawings/Layouts from Agency/Lessor (Design			
	Intent Drawings (DIDs))			
В.	Fire/Safety Approval of Layout Drawings			
C.	Finish Selections to Lessor			
D.	TI Notice to Proceed Issued			
E.	Construction Inspection Reports/Meeting			
	Minutes/Green Lease Submittals			
F.	Acceptance of Space			
	—Measurement of Space			
	—Certificate of Occupancy			
	-Condition Survey Report (Form 1204) Signed by			
	GSA, Agency and Lessor			
	-Punch List and Resolution			
G.	Change Orders Related to Initial Occupancy			
H.	Request Periodic Services Schedule from Lessor,			
	Provide to Lease Administration Manager			
I.	SBA Reporting Letter			
J.	COR Letter to Designated Agency Representative or			
	Field Office			
K.	Notification to Lessor Identifying Designated COR			
L. M.	Final OA and Evidence of Transmittal to Agency Other			

### ∜ a. Simplified Lease Acquisition Model

# GSA

				Document
Χ.	ADMINISTRATION	Required	Note	in File
Α.	Operating Cost Escalations			
Β.	Tax Escalations/Appeals			
C.	Change of Ownership			
D.	Lease Digest (R620)			
E.	RWA's Properly Certified			
F.	Miscellaneous Correspondence			
G.	Appeals/Claims/Disputes			
	-Correspondence			
	-Contracting Officer Decision			
	-Resolution			
	—Unresolved Claim(s)			
	-Civilian Board of Contract Appeals or Claims			
	Court Decision			
	-Payment			
Η.	Task Order Close Out			
1.	CAD As-Builts to CIFM			
J.	Other			



b. Streamlined Lease Model &

# **b. Streamlined Lease Model**

#### Streamlined Lease

Agency:	
Location:	
Square footage:	
Project number:	
OA number:	
Lease number:	
Contracting officer:	
Leasing Specialist/RGA:	
Project manager:	
NBC agent:	
Broker contract number:	
Task order number:	
Phone number:	
Type of lease action:	Streamlined

				Document
l. –	REQUIREMENTS DEVELOPMENT	Required	Note	in File
Α.	SF-81 or Other Request for Space			
В.	Requirements Development Documentation (TMP,			
	Needs Interview Checklist, gPM Documentation, etc.)			
C.	Agency Special Requirements (Option 2) or Agency			
	Specific Requirements (ASR) (Options 1 and 3)			
D.	Design Schematic (Option 1)			
E.	GSA Pricing of TI Costs to Confirm Within TI			
	Allowance			
F.	Vacant Federal Space Check			
G.	Delineated Area			
Η.	Rural Development Act Compliance			
l. –	Justification of Delineated Area Outside CBA			
J.	Notification to City Official			
К.	Notification to Field Office re: Lease Expiration			
L.	Notice to FMSP re: Randolph Sheppard			
М.	Notification to FPS to Request the FSL Determination			
	-FSL Determination and Security Requirements			
Ν.	Initial Scoring Worksheets or Scoring Memorandum			
О.	Draft OA with Streamlined Clauses			
Ρ.	Combined Project Management & Acquisition Plan			
Q.	Project Milestone Schedule			
R.	National Broker Contract Task Order Documentation			
S.	Other			

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### Streamlined Lease

				Document
II.	PRE-SOLICITATION PHASE	Required	Note	in File
Α.	Task Order / Project Orientation Meeting Minutes			
В.	Procurement Summary/FedBizOpps Advertisement and Responses			
C.	Market Survey, Market Survey Report, and Agency			
0.	Concurrence			
D.	Justification for Other Than Full and Open Competition			
E.	Historic Preservation Compliance Check			
F.	Flood Plain Check			
G.	NEPA Compliance			
Η.	Other			
Ш.	SOLICITATION PHASE	Required	Note	Document in File
Α.	Draft RLP Package, including Lease, Special			
	Requirements, and Security Standards			
В.	Technical Review of draft RLP and Draft Lease			
C.	Agency Approval of Draft RLP and Draft Lease			
D.	RLP Package Distribution List			
E.	Final RLP Package with Attachments			
F.	Cover Letter and Procurement Summary Form			
G.	Transmittal of Final RLP Package to Agency, GSA Field Office and FPS			
H.	Amendments to RLP Package			
1.	Correspondence with Offerors Prior to Receipt of			
	Proposals			
J.	Other			
				Document
IV.	PRE-NEGOTIATION/EVALUATIONS OF OFFERS	Required	Note	in File
Α.	Negotiation Objectives			
Β.	Competitive Range Determination/ Notification			
C.	Seismic Review			
D.	Fire Protection & Life Safety Review of Prelease			
	Submittals			
E.	Request for Contractor Support Services for Lease Acquisition (e.g. CQM, Furniture Vendors, Etc.)			
F.	Other			
1.	Other	II		Document
٧.	UNSUCCESSFUL OFFER(S)	Required	Note	in File
Α	Initial Offer and Related Correspondence			
B.	Abstract of Offers			
C.	Scaling/Measurement of Offered Space Floor Plans			
D.	Initial Offer Present Value Analysis (PVA) Evaluation			
E.	Notice of Deficiencies/Discussions/Negotiations			
F.	Revised Offer and Related Correspondence			
G.	Pre-Award DID Submission(s) and Agency Approval (Option 3)			
Η.	Fire/Safety Approval of Layout Drawings (Option 3)			
- I	Request for Final Proposal Revision			
J.	Final Offer and Related Correspondence			
K.	Final Offer Present Value Analysis (PVA) Evaluation			
L.	Pre-Award Notice and Rejection Letters			
М.	Post-Award Notice and Rejection Letters			
N.	Post-Award Debriefings/Protests and			
	Resolution/Congressional Inquiries and Beananasa			
0.	Resolution/Congressional Inquiries and Responses Other			



b. Streamlined Lease Model &

	SUCCESSFUL OFFER AND AWARD			Document
VI.	DETERMINATION	Required	Note	in File
А	Initial Offer and Related Correspondence			
Β.	Abstract of Offers			
C.	Scaling/Measurement of Offered Space Floor Plans			
D.	Initial Offer Present Value Analysis (PVA) Evaluation			
E.	Notice of Deficiencies/Discussions/Negotiations			
F.	Revised Offer and Related Correspondence			
G.	Pre-Award DID submission(s) and agency approval (Option 3)			
H.	Fire/Safety Approval of Layout Drawings (Options 3)			
I.	Request for Final Proposal Revision			
J.	Final Offer and Related Correspondence			
K.	Final Offer Present Value Analysis (PVA) Evaluation			
L.	Price Negotiation Memorandum			
M.	Final Scoring Evaluation			
N.	Seismic Certification			
0.	Flood Plain Compliance			
P.	Responsibility Check:			
	—Central Contractor Registration (CCR) Information			
	via SAM			
	-Excluded Parties List Service (EPLS) via SAM			
	—Past Performance			
	—Financial Responsibility			
Q.	EEO Compliance Review			
R.	Energy Star Compliance/ Cost Effective Energy			
	Efficiency Upgrades			
S.	Evidence of LEED CI Compliance			
T.	Approved Small Business Subcontracting Plan			
U.	Offeror's Proof of Authority and Ownership			
V.	Other			
VII.				Document
(A)	APPROVAL AND FUNDING DOCUMENTS	Required	Note	in File
Α.	Agency Recommendation Letter (From GSA) and			
	Revised OA Signed by Agency			
В.	Receipt of RWA and Required Certification for Turn-			
	key above allowance			
C.	BA 53 Fund Certification			
D.	Legal Review and Comment			
E.	Other			
VII.				Document
<b>(</b> B)	LEASE	Required	Note	in File
Α.	Pre-Award (unsigned) Lease Transmittal Letter			
В.	Executed Lease Transmittal Letter (Award)			
C.	Fully Executed Lease			
D.	Lease Amendment(s)			
E.	Delivery Confirmation of Lease to Lessor			
- F.	Other			

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				Document
VIII.	POST AWARD NOTIFICATIONS	Required	Note	in File
Α.	Post Award Synopsis			
В.	Posting of Redacted Justification for Other Than Full			
	and Open Competition			
C.	Copy of Correspondence Transmitting Lease to Field			
	Office			
D.	Copy of Correspondence Transmitting Lease to			
	Agency			
E.	Copy of Correspondence Transmitting Lease to FPS			
F.	Request to GSA PMC/Field Office for Utility Contract			
G.	Randolph Sheppard Notification to FMSP			
H.	Other			Description
IX.	PRE-OCCUPANCY	Required	Note	Document in File
		Required	Note	in File
Α.	Design Intent Drawings (DIDs) from Lessor (Options 1			
В.	and 2) Fire/Safety Approval of Layout Drawings (Options 1			
D.	and 2)			
C.	Construction Drawings from Lessor			
D.	Construction Drawing Review by Government			
E.	Finish Selections to Lessor			
F.	Lessor's TI Construction Bids on TICS Table			
1.	(Option 2)			
G.	Government Review of TI Costs and/or IGE (Option 2)			
0.				
H.	TI PNM (Option 2)			
l.	Receipt of RWA and Required Certification (Option 2)			
J.	TI Notice to Proceed Issued (Option 2)			
K.	Lessor's BSAC bids on SecUP (FSL III or IV)			
L.	Government's review of BSAC pricing and/or IGE (FSL			
	III or IV)			
М.	BSAC PNM			
Ν.	BSAC Notice to Proceed issued (FSL III or IV)			
0.	Construction Inspection Reports/Meeting			
	Minutes/Green Lease Submittals			
Ρ.	Acceptance of Space			
	—Measurement of Space			
	—Certificate of Occupancy			
	-Condition Survey Report (Form 1204) Signed by			
	GSA, Agency and Lessor			
	—Punch List and Resolution			
Q.	Change Orders Related to Initial Occupancy			
R.	Request Periodic Services Schedule from Lessor,			
	Provide to Lease Administration Manager			
S.	SBA Reporting Letter			
Τ.	COR Letter to Designated Agency Representative or			
	Field Office			
U.	Notification to Lessor Identifying Designated COR			
V.	Final OA and Evidence of Transmittal to Agency			
W.	Other			

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b. Streamlined Lease Model &

### Streamlined Lease

				Document
Χ.	ADMINISTRATION	Required	Note	in File
Α.	Operating Cost Escalations			
В.	Tax Escalations/Appeals			
C.	Change of Ownership			
D.	Lease Digest (R620)			
E.	RWA's Properly Certified			
F.	Miscellaneous Correspondence			
G.	Appeals/Claims/Disputes			
	-Correspondence			
	-Contracting Officer Decision			
	-Resolution			
	—Unresolved Claim(s)			
	-Civilian Board of Contract Appeals or Claims Court			
	Decision			
	—Payment			
Η.	Task Order Close Out			
<u>l</u> .	CAD As-Builts to CIFM			
J.	Other			



# c. Succeeding Lease, Superseding Lease Model

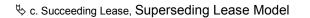
Ag	gency:		
Lo	ocation:		
Sq	quare footage:		
Pro	roject number:		
OF	A number:		
Le	ease number:		
Co	ontracting officer:		
Le	easing Specialist/RGA:		
Pr	roject manager:		
NE	BC agent:		
Br	roker contract number:		
Та	ask order number:		
Ph	hone number:		
Ту	ype of lease action:	Succeeding-Superseding	

				Document
- I	REQUIREMENTS DEVELOPMENT	Required	Note	in File
Α.	SF-81 or Other Request for Space			
В.	Requirements Development Documentation (TMP,			
	Needs Interview Checklist, gPM Documentation, etc.)			
C.	Agency Special Requirements or Agency Specific			
	Requirements (ASR)			
D.	Vacant Federal Space Check			
E.	Delineated Area			
F.	Rural Development Act Compliance			
G.	Justification of Delineated Area Outside CBA			
Η.	Notification to City Official			
- I	Notification to Field Office re: Lease Expiration			
J.	Notice to FMSP re: Randolph Sheppard			
К.	Notification to FPS to Request the FSL Determination			
	-FSL Determination and Security Requirements			
L.	Initial Scoring Worksheets or Scoring Memorandum			
Μ.	Prospectus Submission/Approval (House and Senate			
	Resolutions)			
Ν.	Draft OA			
О.	Succeeding/Superseding Lease Decision Tool: All			
	worksheets			
Ρ.	Combined Project Management & Acquisition Plan			
Q.	Project Milestone Schedule			
R.	National Broker Contract Task Order Documentation			
S	Other			



c. Succeeding Lease, Superseding Lease Model &

II.     PRE-SOLICITATION PHASE     Required     Note     in File       A.     Task Order / Project Orientation Meeting Minutes          B.     Procurement Summary/FedBizOpps Advertisement and Responses          C.     Market Survey Analysis and Negotiation Objectives          D.     Justification for Other Than Full and Open Competition          E.     Historic Preservation Compliance Check          F.     Filod Plain Check          G.     NEPA Compliance          H.     Other           Market Survey Analysis and Negotiation Advertisement          G.     NEPA Compliance          H.     Other           Market Survey Analysis and Negotiation Advertisement           C. Frinal RLP Package with					Document
B.       Procurement Summary/FedBizOpps Advertisement and Responses	П.	PRE-SOLICITATION PHASE	Required	Note	in File
and Responses	Α.	Task Order / Project Orientation Meeting Minutes			
C.       Market Survey Analysis and Negotiation Objectives	В.	Procurement Summary/FedBizOpps Advertisement			
D.       Justification for Other Than Full and Open Competition         E.       Historic Preservation Compliance Check         F.       Flood Plain Check         G.       NEPA Compliance         H.       Other         III.       SOLICITATION PHASE         Requirements, and Security Standards       Documen         B.       Agency Approval of Draft RLP and Draft Lease         C.       Final RLP Package with Attachments         D.       Cover Letter and Procurement Summary Form         E.       Transmittal of Final RLP Package to Agency, GSA         Field Office and FPS       Field Office and FPS         F.       Amendments to RLP Package         G.       Correspondence with Offerors Prior to Receipt of Proposals         H.       Other         Dotumentials       Document         Seismic Review       Document         B.       Fire Protection & Life Safety Review of Prelease         Submittals       Submittals         C.       Requisition (e.g. CQM, Furniture Vendors, Etc.)         D.       Other					
E.       Historic Preservation Compliance Check       Image: Check for the chec					
F.       Flood Plain Check					
G.       NEPA Compliance       Documen         H.       Other       Documen         III.       SOLICITATION PHASE       Required       Note         A.       Draft RLP Package, including Lease, Special Requirements, and Security Standards       Documen         B.       Agency Approval of Draft RLP and Draft Lease       C         C.       Final RLP Package with Attachments       D         D.       Cover Letter and Procurement Summary Form       E         E.       Transmittal of Final RLP Package to Agency, GSA Field Office and FPS       F         F.       Amendments to RLP Package       C         G.       Correspondence with Offerors Prior to Receipt of Proposals       Documen         H.       Other       Documen       In File         A.       Seismic Review       E       Documen         B.       Fire Protection & Life Safety Review of Prelease Submittals       Submittals       Documen         C.       Request for Contractor Support Services for Lease Acquisition (e.g. CQM, Furniture Vendors, Etc.)       Documen       Documen         D.       Other       Documen       Documen       Documen					
H.       Other       Documen in File         III.       SOLICITATION PHASE       Required       Note       in File         A.       Draft RLP Package, including Lease, Special Requirements, and Security Standards       Decument       Image: Special Requirements, and Security Standards       Image: Special Requirements, and Security Standards         B.       Agency Approval of Draft RLP and Draft Lease       Image: Special Requirements, and Security Standards       Image: Special Requirements, and Security Standards         C.       Final RLP Package with Attachments       Image: Special Requirement Summary Form       Image: Special Requirement Summary Form       Image: Special Requirement Summary Form         E.       Transmittal of Final RLP Package to Agency, GSA Field Office and FPS       Image: Special Requirement Standards       Image: Special Requirement Standards         F.       Amendments to RLP Package       Image: Special Requirement Standards					
III.     SOLICITATION PHASE     Required     Note     In File       A.     Draft RLP Package, including Lease, Special Requirements, and Security Standards     Image: Special Requirements, and Security Standards     Image: Special Requirements, and Security Standards     Image: Special Requirements, and Security Standards       B.     Agency Approval of Draft RLP and Draft Lease     Image: Special Requirements, and Security Standards     Image: Special Requirements, and Security Standards       D.     Cover Letter and Procurement Summary Form     Image: Special Reiel Office and FPS     Image: Special Reiel Office and FPS       F.     Amendments to RLP Package     Image: Special Receipt of Proposals     Image: Special Required     Image: Special Required       H.     Other     Image: Special Receipt of Proposals     Image: Special Receipt of Proposals     Image: Special Receipt of Proposals       H.     Other     Image: Special Review     Image: Special Receipt of Proposals     Image: Special Receipt of Proposals       B.     Fire Protection & Life Safety Review of Prelease Submittals     Image: Special Receipt of Proposals     Image: Special Receipt of Proposals       C.     Request for Contractor Support Services for Lease Acquisition (e.g. CQM, Furniture Vendors, Etc.)     Image: Special Receipt of Document       D.     Other     Image: Special Receipt of Document     Image: Special Receipt of Document	-				
III.     SOLICITATION PHASE     Required     Note     in File       A.     Draft RLP Package, including Lease, Special Requirements, and Security Standards	H.	Other			
A.       Draft RLP Package, including Lease, Special Requirements, and Security Standards       Image: Constraint of Standards         B.       Agency Approval of Draft RLP and Draft Lease       Image: Constraint of Standards         C.       Final RLP Package with Attachments       Image: Constraint of Standards         D.       Cover Letter and Procurement Summary Form       Image: Constraint of Standards         E.       Transmittal of Final RLP Package to Agency, GSA Field Office and FPS       Image: Constraint of Standards         F.       Amendments to RLP Package       Image: Constraint of Standards       Image: Constraint of Standards         G.       Correspondence with Offerors Prior to Receipt of Proposals       Image: Constraint of Standards       Image: Constraint of Standards         H.       Other       Image: Constraint of Standards       Image: Constraint of Standards       Image: Constraint of Standards         B.       Fire Protection & Life Safety Review of Prelease Submittals       Image: Constractor Support Services for Lease Acquisition (e.g. CQM, Furniture Vendors, Etc.)       Image: Constractor Support Services for Lease Acquisition (e.g. CQM, Furniture Vendors, Etc.)       Image: Constractor Support Services for Lease Acquisition (e.g. CQM, Furniture Vendors, Etc.)       Image: Constractor Support Services for Lease Acquisition (e.g. CQM, Furniture Vendors, Etc.)				N /	
Requirements, and Security Standards			Required	Note	In File
B.       Agency Approval of Draft RLP and Draft Lease	А.				
C.       Final RLP Package with Attachments	_				
D.       Cover Letter and Procurement Summary Form         E.       Transmittal of Final RLP Package to Agency, GSA         Field Office and FPS					
E.       Transmittal of Final RLP Package to Agency, GSA Field Office and FPS       Image: Construction of the constr		· · · · · · · · · · · · · · · · · · ·			
Field Office and FPS					
G.       Correspondence with Offerors Prior to Receipt of Proposals	⊏.	• • •			
Proposals       Document         H.       Other       Document         IV.       PRE-NEGOTIATION/EVALUATION OF OFFERS       Required       Note       In File         A.       Seismic Review       Image: Seismic Review of Prelease	F.	Amendments to RLP Package			
H.       Other       Documen         IV.       PRE-NEGOTIATION/EVALUATION OF OFFERS       Required       Note       in File         A.       Seismic Review       Image: Seismic Review       Image: Seismic Review       Image: Seismic Review of Prelease	G.	Correspondence with Offerors Prior to Receipt of			
IV.       PRE-NEGOTIATION/EVALUATION OF OFFERS       Required       Note       Document         A.       Seismic Review              File  <		Proposals			
IV.     PRE-NEGOTIATION/EVALUATION OF OFFERS     Required     Note     in File       A.     Seismic Review          B.     Fire Protection & Life Safety Review of Prelease Submittals          C.     Request for Contractor Support Services for Lease Acquisition (e.g. CQM, Furniture Vendors, Etc.)          D.     Other	H.	Other			
A.       Seismic Review       Image: Seismic Review         B.       Fire Protection & Life Safety Review of Prelease       Image: Submittals         C.       Request for Contractor Support Services for Lease       Image: Acquisition (e.g. CQM, Furniture Vendors, Etc.)         D.       Other       Image: Documen					Document
B.       Fire Protection & Life Safety Review of Prelease Submittals	IV.	PRE-NEGOTIATION/EVALUATION OF OFFERS	Required	Note	in File
Submittals     Image: Constractor Support Services for Lease Acquisition (e.g. CQM, Furniture Vendors, Etc.)       D.     Other	Α.				
C.       Request for Contractor Support Services for Lease Acquisition (e.g. CQM, Furniture Vendors, Etc.)       Image: CQM - Contractor Support Services for Lease Acquisition (e.g. CQM, Furniture Vendors, Etc.)         D.       Other       Image: CQM - Contractor Support Services for Lease Acquisition (e.g. CQM, Furniture Vendors, Etc.)         D.       Other       Image: CQM - Contractor Support Services for Lease Acquisition (e.g. CQM, Furniture Vendors, Etc.)	В.	-			
Acquisition (e.g. CQM, Furniture Vendors, Etc.) D. Other Documen					
D. Other Documen	C.				
Documen					
	D.	Other			
V. UNSUCCESSFUL OFFER(S)—N/A Required Note in File					
	V.	UNSUCCESSFUL OFFER(S)—N/A	Required	Note	in File





	SUCCESSFUL OFFER AND AWARD			Document
VI.	DETERMINATION	Required	Note	in File
Α	Initial Offer and Related Correspondence			
В.	Abstract of Offers			
C.	Notice of Deficiencies/Discussions/Negotiations			
D.	Revised Offer and Related Correspondence			
E.	Request for Final Proposal Revision			
F.	Final Offer and Related Correspondence			
G.	Price Negotiation Memorandum			
Η.	Final Scoring Evaluation			
- I.	Seismic Certification			
J.	Flood Plain Compliance			
K.	Responsibility Check			
	-Central Contractor Registration (CCR) Information			
	via SAM			
	-Excluded Parties List Service (EPLS) via SAM			
	-Past Performance			
	—Financial Responsibility			
L.	EEO Compliance Review			
М.	Energy Star Compliance/ Cost Effective Energy			
	Efficiency Upgrades			
Ν.	Approved Small Business Subcontracting Plan			
0.	Offeror's Proof of Authority and Ownership			
Ρ.	Other			
VII.				Document
(A)	APPROVAL AND FUNDING DOCUMENTS	Required	Note	in File
Α.	Agency Recommendation Letter (From GSA) and			
	Revised OA Signed by Agency			
В.	Receipt of RWA and Required Certification			
C.	BA 53 Fund Certification			
D.	Legal Review and Comment			
E.	Other			
VII.		- · ·		Document
(B)	LEASE	Required	Note	in File
Α.	Pre-Award (unsigned) Lease Transmittal Letter			
В.	Executed Lease Transmittal Letter (Award)			
C.	Fully Executed Lease			
D.	Lease Amendment(s)			
E.	Delivery Confirmation of Lease to Lessor			
F.	Other	i – – –		



VIII.	POST AWARD NOTIFICATIONS	Required	Note	Document in File
A.	Post Award Synopsis	Required	Note	
B.	Posting of Redacted Justification for Other Than Full			
υ.	and Open Competition			
C.	Copy of Correspondence Transmitting Lease to Field			
0.	Office			
D.	Copy of Correspondence Transmitting Lease to			
	Agency			
E.	Copy of Correspondence Transmitting Lease to FPS			
F.	Request to GSA PMC/Field Office for Utility Contract			
G.	Randolph Sheppard Notification to FMSP			
Η.	Other			
				Document
IX.	POST AWARD	Required	Note	in File
Α.	Finish Selections to Lessor			
В.	Construction Inspection Reports/Meeting			
	Minutes/Green Lease Submittals			
C.	Acceptance of Space			
	-Condition Survey Report (Form 1204) Signed by			
	GSA, Agency and Lessor			
	—Punch List and Resolution			
D. E.	Change Orders Related to Initial Occupancy Request Periodic Services Schedule from Lessor,			
⊑.	Provide to Lease Administration Manager			
F.	SBA Reporting Letter			
G.	COR Letter to Designated Agency Representative or			
	Field Office			
H.	Notification to Lessor Identifying Designated COR			
Ι.	Final OA and Evidence of Transmittal to Agency			
J.	Other			
				Document
Χ.	ADMINISTRATION	Required	Note	in File
A.	Operating Cost Escalations			
B.	Tax Escalations/Appeals			
C. D.	Change of Ownership Lease Digest (R620)			
E.	RWA's Properly Certified			
F.	Miscellaneous Correspondence			
G.	Appeals/Claims/Disputes			
	-Correspondence			
	-Contracting Officer Decision			
	-Resolution			
	—Unresolved Claim(s)			
	-Civilian Board of Contract Appeals or Claims Court			
	Decision			
	—Payment			
Н.	Task Order Close Out			
<u> </u>	CAD As-Builts to CIFM			
J.	Other			



d. Standard Lease Model &

# d. Standard Lease Model

Age	ncy:	
Loca	ation:	
Squ	are footage:	
Proj	ect number:	
OA	number:	
Leas	se number:	
Con	tracting officer:	
Leas	sing Specialist/RGA:	
Proj	iect manager:	
NBC	Cagent:	
Brok	ker contract number:	
Tasl	k order number:	
Pho	ne number:	
Тур	e of lease action:	Standard

				Document
l. –	REQUIREMENTS DEVELOPMENT	Required	Note	in File
Α.	SF-81 or Other Request for Space			
B.	Requirements Development Documentation (TMP,			
	Needs Interview Checklist, gPM Documentation, etc.)			
C.	Agency Special Requirements or Agency Specific			
	Requirements (ASR)			
D.	Vacant Federal Space Check			
E.	Delineated Area			
F.	Rural Development Act Compliance			
G.	Justification of Delineated Area Outside CBA			
Η.	Notification to City Official			
<u> </u>	Notification to Field Office re: Lease Expiration			
J.	Notice to FMSP re: Randolph Sheppard			
Κ.	Notification to FPS to Request the FSL Determination			
	-FSL Determination and Security Requirements			
L.	Initial Scoring Worksheets or Scoring Memorandum			
М.	Prospectus Submission/Approval (House and Senate			
	Resolutions)			
Ν.	Draft OA			
0.	Combined Project Management & Acquisition Plan			
Ρ.	Project Milestone Schedule			
Q.	National Broker Contract Task Order Documentation			
R.	Other			



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١١.	PRE-SOLICITATION PHASE	Required	Note	Document in File
A.	Task Order / Project Orientation Meeting Minutes			
B.	Procurement Summary/FedBizOpps Advertisement and Responses			
C.	Market Survey, Market Survey Report, and Agency Concurrence			
D.	Justification for Other Than Full and Open Competition			
E.	Historic Preservation Compliance Check			
F.	Flood Plain Check			
G.	NEPA Compliance			
H.	Source Selection: Plan (Signed) and Related Correspondence			
<u> </u>	Other			
				Document
- 111.	SOLICITATION PHASE	Required	Note	in File
Α.	Draft RLP Package, including Lease, Special			
	Requirements, and Security Standards			
Β.	Technical Review of Draft RLP and Draft Lease			
C.	Agency Approval of Draft RLP and Draft Lease			
D.	RLP Package Distribution List			
E.	Final RLP Package with Attachments			
F.	Cover Letter and Procurement Summary Form			
G.	Transmittal of Final RLP Package to Agency, GSA Field Office and FPS			
Η.	Amendments to RLP Package			
1.	Davis Bacon Wage Rates (Updated at FPR)			
J.	Correspondence with Offerors Prior to Receipt of Proposals			
K.	Other			
IV.	PRE-NEGOTIATION/EVALUATION OF OFFERS	Required	Note	Document in File
Α.	Negotiation Objectives			
Β.	Competitive Range Determination/ Notification			
C.	Seismic Review			
D.	Fire Protection & Life Safety Review of Prelease Submittals			
E.	Request for Contractor Support Services for Lease Acquisition (e.g. CQM, Furniture Vendors, Etc.)			
F.	Other			



d. Standard Lease Model &

				Document
٧.	UNSUCCESSFUL OFFER(S)	Required	Note	in File
Α.	Initial Offer and Related Correspondence			
Β.	Abstract of Offers			
C.	Scaling/Measurement of Offered Space Floor Plans			
D.	Initial Offer Present Value Analysis (PVA) Evaluation			
E.	Notice of Deficiencies/Discussions/Negotiations			
F.	Revised Offer and Related Correspondence			
G.	Request for Final Proposal Revision			
Η.	Final Offer and Related Correspondence			
l. –	Final Offer Present Value Analysis (PVA) Evaluation			
J.	Pre-Award Notice and Rejection Letters			
Κ.	Post-Award Notice and Rejection Letters			
L.	Post-Award Debriefings/Protests and			
	Resolution/Congressional Inquiries and Responses			
Μ.	Other			
	SUCCESSFUL OFFER AND AWARD			Document
VI.	DETERMINATION	Required	Note	in File
А	Initial Offer and Related Correspondence			
Β.	Abstract of Offers			
С.	Scaling/Measurement of Offered Space Floor Plans			
D.	Initial Offer Present Value Analysis (PVA) Evaluation			
Ε.	Notice of Deficiencies/Discussions/Negotiations			
F.	Revised Offer and Related Correspondence			
G.	Request for Final Proposal Revision			
Η.	Final Offer and Related Correspondence			
- I	Final Offer Present Value Analysis (PVA) Evaluation			
J.	Price Negotiation Memorandum			
Κ.	Source Selection: Initial and Final Evaluation Reports			
L.	Source Selection: Conflict of Interest and Non-			
	Disclosure Documentation			
М.	Source Selection: Source Selection Authority Decision			
N.	Final Scoring Evaluation			
0. P.	Seismic Certification			
-	Flood Plain Compliance Negotiations of Environmental Remediation			
Q. R.	·			
K.	Responsibility Check —Central Contractor Registration (CCR) Information			
	via SAM —Excluded Parties List Service (EPLS) via SAM			
	-Past Performance			
	-Financial Responsibility			
S.	EEO Compliance Review			
<u>т.</u>	Energy Star Compliance/ Cost Effective Energy			
	Efficiency Upgrades			
U.	Evidence of LEED Compliance			
V.	Approved Small Business Subcontracting Plan			
W.	Offeror's Proof of Authority and Ownership			
X.	Other			
A.	Otto			



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VII.				Document
(A)	APPROVAL AND FUNDING DOCUMENTS	Required	Note	in File
Α.	Agency Recommendation Letter (From GSA) and			
	Revised OA Signed by Agency			
Β.	Receipt of RWA and Required Certification			
C.	BA 53 Fund Certification			
D.	Legal Review and Comment			
E.	Other			
VII.				Document
<b>(</b> B)	LEASE	Required	Note	in File
Α.	Pre-Award (unsigned) Lease Transmittal Letter			
Β.	Executed Lease Transmittal Letter (Award)			
C.	Fully Executed Lease			
D.	Lease Amendment(s)			
E.	Delivery Confirmation of Lease to Lessor			
F.	Other			
				Document
VIII.	POST AWARD NOTIFICATIONS	Required	Note	in File
Α	Post Award Synopsis			
В.	Posting of Redacted Justification for Other Than Full and Open Competition			
C.	Copy of Correspondence Transmitting Lease to Field			
	Office			
D.	Copy of Correspondence Transmitting Lease to			
	Agency			
E.	Copy of Correspondence Transmitting Lease to FPS			
F.	Request to GSA PMC/Field Office for Utility Contract			
G.	Randolph Sheppard Notification to FMSP			
Η.	Other			



d. Standard Lease Model &

### Standard Lease

				Document
IX.	POST AWARD	Required	Note	in File
A.	Drawings/Layouts from Agency/Lessor (Design Intent Drawings (DIDs))			
Β.	Fire/Safety Approval of Layout Drawings			
C.	Construction Drawings from Lessor			
D.	Construction Drawing Review by Government			
E.	Finish Selections to Lessor			
F.	Lessor's TI Construction Bids on TICS Table			
G.	Government Review of TI Costs and/or IGE			
H.	TI PNM			
- I	Receipt of RWA and Required Certification			
J.	TI Notice to Proceed Issued			
K.	Lessor's BSAC bids on SecUP (FSL III or IV)			
L.	Government's review of BSAC pricing and/or IGE (FSL			
	III or IV)			
М.	BSAC PNM			
N.	BSAC Notice to Proceed issued (FSL III or IV)			
Ο.	Construction Inspection Reports/Meeting			
	Minutes/Green Lease Submittals			
P.	Acceptance of Space			
	—Measurement of Space			
	-Certificate of Occupancy			
	-Condition Survey Report (Form 1204) Signed by			
	GSA, Agency and Lessor			
	-Punch List and Resolution			
Q.	Change Orders Related to Initial Occupancy			
R.	Request Periodic Services Schedule from Lessor,			
	Provide to Lease Administration Manager			
S.	Davis Bacon Interview Forms and Wage Payment			
Τ.	SBA Reporting Letter			
U.	COR Letter to Designated Agency Representative or Field Office			
V.	Notification to Lessor Identifying Designated COR			
W.	Final OA and Evidence of Transmittal to Agency			
X.	Other			
<u>^.</u>	Oulei			Document
х.	ADMINISTRATION	Required	Note	in File
Α.	Operating Cost Escalations			
Β.	Tax Escalations/Appeals			
C.	Change of Ownership			
D.	Lease Digest (R620)			
E.	RWA's Properly Certified			
F.	Miscellaneous Correspondence			
G.	Appeals/Claims/Disputes			
	-Correspondence			
	-Contracting Officer Decision			
	-Resolution			
	—Unresolved Claim(s)			
	-Civilian Board of Contract Appeals or Claims Court			
	Decision			
	Decision —Payment			
H.				
H. I.	—Payment			



# e. On-Airport Lease Model

#### **On-Airport Lease**

Agency:	
Location:	
Square footage:	
Project number:	
OA number:	
Lease number:	
Contracting officer:	
Leasing Specialist/RGA:	
Project manager:	
NBC agent:	
Broker contract number:	
Task order number:	
Phone number:	
Type of lease action:	On-Airport

		Described	Nede	Document
l.	REQUIREMENTS DEVELOPMENT	Required	Note	in File
A. B.	SF-81 or Other Request for Space			
D.	Requirements Development Documentation (On Airport Requirements Questionnaire; gPM			
C.	Agency Special Requirements or Agency Specific			
U.	Requirements (ASR)			
D.	Notification to Field Office re: Lease Expiration			
<u>р.</u> Е.	Notification to FPS for Additional Security Requirements			
E. E.				
G.	Initial Scoring Worksheets/ Scoring Memorandum Draft OA			
G. H.				
	Combined Project Management & Acquisition Plan			
<u> </u>	Project Milestone Schedule Other			
J.	Other			Document
П.	PRE-SOLICITATION PHASE	Required	Note	in File
A.		rcequirea	Note	in File
A.	Procurement Summary/FedBizOpps Advertisement and Responses			
B.	Justification for Other Than Full and Open			
D. C.	Historic Preservation Compliance Check			
D.	Flood Plain Check			
E.				
E.	NEPA Compliance Other			
г.	Other			Document
Ш.	SOLICITATION PHASE-NOT APPLICABLE	Required	Note	in File
	SUCIEITATION PHASE—NUT APPLICABLE	Required	Note	in File
				Document
IV.	PRE-NEGOTIATION/EVALUATION OF OFFERS	Required	Note	in File
		Required	Note	IIITIle
A. B.	Negotiation Objectives Seismic Review			
В. С.	Request for Contractor Support Services for Lease			
U.				
D.	Acquisition (e.g. CQM, Furniture Vendors, Etc.)			
D.	Other			



e. On-Airport Lease Model &

#### **On-Airport Lease**

v.	UNSUCCESSFUL OFFER(S)-NOT APPLICABLE	Required	Note	Document in File
				Decument
VI.	SUCCESSFUL OFFER AND AWARD DETERMINATION	Required	Note	Document in File
A	Offer and Related	Requireu	Note	in File
~	Correspondence/Discussions/Negotiations			
B.	Scaling/Measurement of Offered Space Floor Plans			
C.	Price Negotiation Memorandum			
D.	Final Scoring Evaluation			
E.	Negotiations of Environmental Remediation			
F.	Responsibility Check			
	-Central Contractor Registration (CCR) Information via SAM			
	-Excluded Parties List Service (EPLS) via SAM			
	-Past Performance			
G.	EEO Compliance Review			
H.	Energy Star Compliance/ Cost Effective Energy			
	Efficiency Upgrades			
I	Approved Small Business Subcontracting Plan			
J.	Offeror's Proof of Authority and Ownership			
K.	Other			
VII.				Document
(A)	APPROVAL AND FUNDING DOCUMENTS	Required	Note	in File
Α.	Agency Recommendation Letter (From GSA) and			
	Revised OA Signed by Agency			
В.	Receipt of RWA and Required Certification			
C.	BA 53 Fund Certification			
D.	Legal Review and Comment			
E.	Other			
VII.				Document
(B)	LEASE	Required	Note	in File
Α.	Pre-Award (unsigned) Lease Transmittal Letter			
В.	Executed Lease Transmittal Letter (Award)			
С.	Fully Executed Lease			
D.	Lease Amendment(s)			
E.	Delivery Confirmation of Lease to Lessor			
F.	Other			
VIII.	POST AWARD NOTIFICATIONS	Required	Note	Document in File
Α.	Post Award Synopsis			
В.	Posting of Redacted Justification for Other Than Full and Open Competition			
C.	Copy of Correspondence Transmitting Lease to Field Office			
D.	Copy of Correspondence Transmitting Lease to Agency			
E.	Copy of Correspondence Transmitting Lease to FPS			
F.	Request to GSA PMC/Field Office for Utility Contract			
G.	Randolph Sheppard Notification to FMSP			
Η.	Other			

### ♦ e. On-Airport Lease Model

### **On-Airport Lease**

IX.	POST AWARD	Required	Note	Document in File
A.	Drawings/Layouts from Agency/Lessor (Design Intent			
	Drawings (DIDs))			
В.	Fire/Safety Approval of Layout Drawings			
C.	Finish Selections			
D.	Notification to Contract Specialist/1102 Procuring			
	Space Build Out			
E.	Receipt of RWA and Required Certification			
F.	Construction Inspection Reports/Meeting Minutes/			
	Submittals			
G.	Acceptance of Space			
	—Measurement of Space			
	—Certificate of Occupancy			
	—Condition Survey Report (Form 1204) Signed by			
	GSA, Agency and Lessor			
	—Punch List and Resolution			
H.	Change Orders Related to Initial Occupancy			
l. –	SBA Reporting Letter			
J.	COR Letter to Designated Agency Representative or			
	Field Office			
K.	Notification to Lessor Identifying Designated COR			
L.	Final OA and Evidence of Transmittal to Agency			
М.	Other			
				Document
Χ.	ADMINISTRATION	Required	Note	in File
Α.	Change of Ownership			
B.	Lease Digest (R620)			
C.	RWA's Properly Certified			
D.	Miscellaneous Correspondence			
E.	Appeals/Claims/Disputes			
	-Correspondence			
	-Contracting Officer Decision			
	-Resolution			
	—Unresolved Claim(s)			
	-Civilian Board of Contract Appeals or Claims Court			
	Decision			
	—Payment			
F.	Other			

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