



GSA  1

# Lease Process




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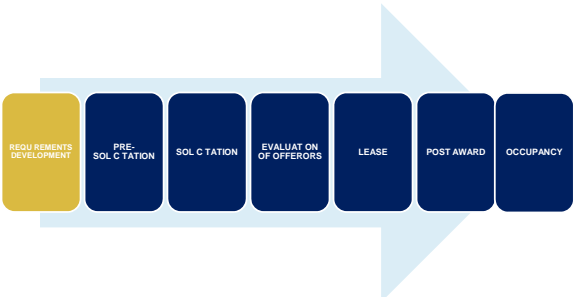
## Lease Process




```
graph LR; A[REQUIREMENTS DEVELOPMENT] --> B[PRE-SOLICITATION]; B --> C[SOLICITATION]; C --> D[EVALUATION OF OFFERORS]; D --> E[LEASE]; E --> F[POST AWARD]; F --> G[OCCUPANCY]
```

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## Requirements Development



```
graph LR; A[REQUIREMENTS DEVELOPMENT] --> B[PRE-SOLICITATION]; B --> C[SOLICITATION]; C --> D[EVALUATION OF OFFERORS]; D --> E[LEASE]; E --> F[POST AWARD]; F --> G[OCCUPANCY]
```


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## Space Request

- R#spacerequest@gsa.gov
- Standard Form 81 or other approved communication
- Acknowledge upon receipt




```
graph LR; A[REQUIREMENTS DEVELOPMENT] --> B[PRE-SOLICITATION]; B --> C[SOLICITATION]; C --> D[EVALUATION OF OFFERORS]; D --> E[LEASE]; E --> F[POST AWARD]; F --> G[OCCUPANCY]
```

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### Confirming Requirements

- How much space do you need?
  - ANSI/BOMA OFFICE AREA (ABOA)
- What type of space do you need?
- How long do you anticipate occupying the space?
- Is there anything special or unique about your space needs?
- Are there any preferences we should consider?
- Where do you need the space?
- When do you need the space?


REQUIREMENTS DEVELOPMENT PRE-SOLICITATION SOLICITATION EVALUATION OF OFFERORS LEASE POST AWARD OCCUPANCY




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### GSA Considers:


- Competition in Contracting Act (CICA)
- Rural Development Act of 1972
- Executive Order 11988 – Floodplain Management
- Executive Order 12072 – Federal Space Management
- Executive Order 13006 – Locating Federal Properties on Historic Properties in Nation's Central Cities
- Congressional Districts
- Federal Management Regulation (FMR) - Chapter 102
- Special Requirements




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### Understanding Delineated Area


DOs




DONTs



REQUIREMENTS DEVELOPMENT PRE-SOLICITATION SOLICITATION EVALUATION OF OFFERORS LEASE POST AWARD OCCUPANCY




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### Acquisition Strategy

Lowest Cost

Tradeoff


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### Determine Lease Model


- Simplified**
- Succeeding/Superseding**
- Streamlined**
- Standard**
- On Airport**




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### Types of Lease Models

Lease Model	Rent	Parameters
<b>Simplified</b>	≤ \$150k Net Avg. Annual Rent	Smaller Leases; Security Level I & II
<b>Succeeding/Superseding</b>	All Levels	Stay-In-Place Leases
<b>Streamlined</b>	≤ \$500k Net Annual Rent	Small to Mid-Size Leases; Security Level I-III; 3 TI approaches
<b>Standard</b>	All Levels	Applicable to all security & rent levels and leases not accommodated by other models.
<b>On Airport</b>	All Levels	Agencies located at the airport





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### Agency Commitment

Commitment to:

- ✓ **The Lease Model**
- ✓ **Funding required**


- Incorporate schedule (15 milestones)
- Include the draft Occupancy Agreement (OA)

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### Pre-Solicitation





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### Advertising


- If Requirement > 10k ABOA Square Feet
  - LCO must advertise via FedBizOppz
- If Requirement < 10k ABOA Square Feet
  - LCO must seek competition

REQUIREMENTS DEVELOPMENT
  PRE-SOLICITATION
  SOLICITATION
  EVALUATION OF OFFERORS
  LEASE
  POST AWARD
  OCCUPANCY



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### Market Survey




Who Should Come?

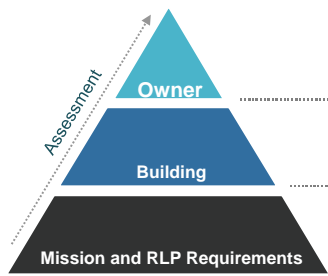
- GSA LCO/LCS
- Agency Rep with Signatory Authority
- GSA Broker (if applicable)

REQUIREMENTS DEVELOPMENT
  PRE-SOLICITATION
  SOLICITATION
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  LEASE
  POST AWARD
  OCCUPANCY




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### Assessment



- Is the owner willing to modify the building to meet the requirements?
- If not, is the building capable of meeting those requirements?
- Does the building meet the agency's mission requirements?
- Does the building meet the RLP requirements?



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### Decision to Solicit

**DECISION TO SOLICIT**


a. This building:  
 \_\_\_\_\_ will be solicited. It meets or is capable of meeting the RLP standards.  
 \_\_\_\_\_ will not be solicited. It does not meet and is not capable of meeting the RLP standards for the following reason(s):

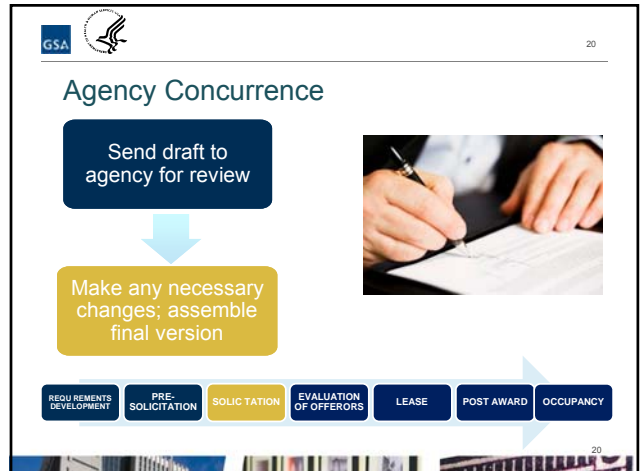
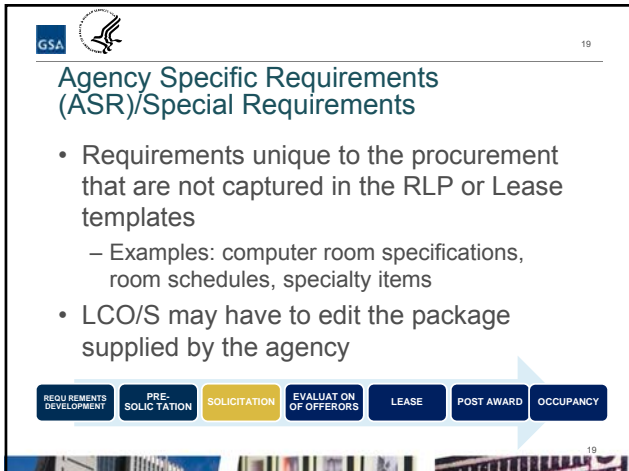
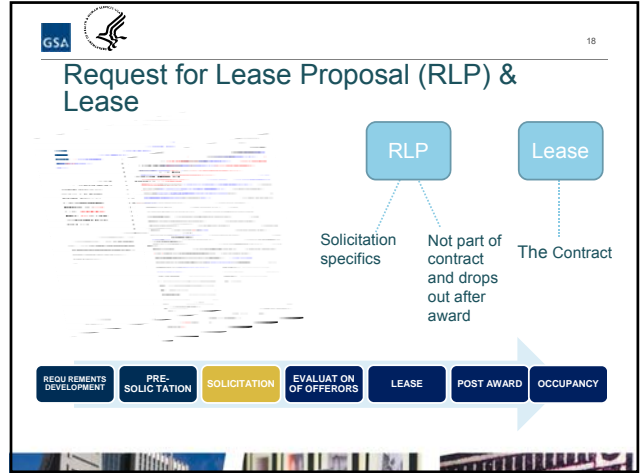
b. The client agency representative present on the market survey:  
 \_\_\_\_\_ agrees with the above decision  
 \_\_\_\_\_ does not agree with the above decision for the following reason(s):


\_\_\_\_\_ Agency Representative      \_\_\_\_\_ Title  
 \_\_\_\_\_ Person Conducting Survey      \_\_\_\_\_ Title

**Make sure to put the reasons!!**

REQUIREMENTS DEVELOPMENT
  PRE-SOLICITATION
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  OCCUPANCY







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### Issuing an RLP Package

- Minimum response time is **20 calendar days**
- Send copy, with cover letter, to:
  - All Offerors found capable of meeting requirements
  - Any party requesting a copy
  - Tenant agency (facilities)
  - GSA Property Manager
  - Federal Protective Service




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### Evaluation of Offerors

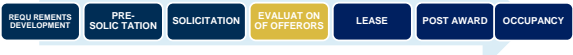


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### LCO/S Goals

- Maintain good relationships
- Stay on schedule
- Find objective criteria
- Stay within your defined price range
- Verify technical compliance
- Make fair and reasonable determination




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### Technical Review

- Fire Protection of Life Safety (FPLS)
- Scaling of Offered Space
- Seismic Safety
- Energy Star
- Federal Protective Service (FPS)



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### Evaluation of Proposals


Lowest cost  
technically  
acceptable

- Lowest cost=lowest PV
- Technically acceptable = satisfies RLP requirements

Tradeoff

- May not be lowest offer
- Non-monetary award factors considered (e.g. design, experience, past performance, location)



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### Final Proposal Revision (FPR)

- FPR: last opportunity for Offeror to revise proposal prior to award
- Post-FPR: no negotiations allowed; clarifications only
- Prior to the call for FPR, the LS should have at least one responsive proposal in hand

REQUIREMENTS DEVELOPMENT

PRE-SOLICITATION


SOLICITATION

EVALUATION OF OFFERS

LEASE

POST AWARD

OCCUPANCY



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### Evaluation of Offerors

REQUIREMENTS DEVELOPMENT

PRE-SOLICITATION


SOLICITATION


EVALUATION OF OFFERS

LEASE


POST AWARD

OCCUPANCY



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### Recommending the Space



- Issue space recommendation
  - Agency acceptance
  - Building information
  - Floor plan

- Revise OA to reflect negotiated lease terms
- Agency must sign OA prior to lease award

REQUIREMENTS DEVELOPMENT

PRE-SOLICITATION


SOLICITATION

EVALUATION OF OFFERS

LEASE

POST AWARD

OCCUPANCY



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## Assembling Lease



- Lease Contract
  - Agency's Special Requirements (ASR)
  - Interagency Security Criteria Specifications
- Lease Amendments
- GSA Form 3517 (General Clauses)
- GSA Form 3518 (Reps and Certs)
- Floor plans




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## Awarding the Lease

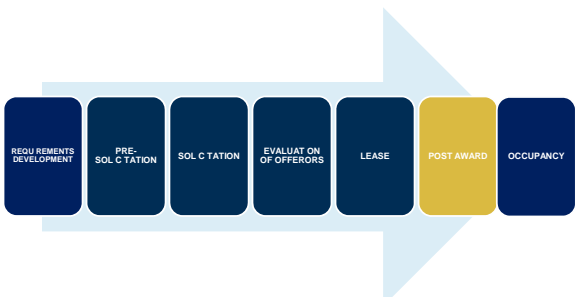
- Only an LCO can award a lease
- Lease awarded after executed by GSA & Lessor
- Provide copy to agency




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## Evaluation of Offerors




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## Preparing Design Intent Drawings (DIDs)?

- Lessor**
  - Through DID workshop or offline
- GSA**
  - In-house interior designer or contract services
  - Reimbursable cost/verify funding
- Tenant Agency**
  - In-house interior designer




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### Simplified Model: Post-Award

- Per OA ad hoc clause, agency committed to “assist with development of DIDs”
- Lessor obligated to complete DIDs within 10 working days of award
  - Three versions maximum
- Review of Construction Drawings (CD) not required




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### Succeeding/Superseding: Requirements Development

- Client agency is satisfied with space
- Minimal alterations required
  - Carpet/paint refresh
  - Scope of Work required for other improvements




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### Streamlined/Standard Model Features



- Three Tenant Improvement (TI) options
  - Turnkey Pricing with Design Schematic
  - TI Allowance
  - Turnkey Pricing with Pre-Award DIDs




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### CD Review Process

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### TI Competitive Process



- Lessor must demonstrate best efforts to obtain most competitive price
- Minimum of two qualified contractor proposals
- Proposal shall be submitted in the Tenant Improvement Cost Summary (TICS) Table
- Bids must reflect terms of lease and approved design
- Bids must separate shell from TI items


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### Negotiating the TI

- TI process is a negotiation
- LCO/S reviews line items
  - Shell vs TI
- Ensure proper documentation
  - Lease Amendment(s)
  - OA




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### Granting Notice To Proceed (NTP)

- Only LCO can grant NTP when:
  - ✓ Fair and reasonable determination made
  - ✓ Lessor's cost proposal is accepted (based on lowest bid and qualified contractor)
  - ✓ Funds are available
- Must state price agreed upon



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### Build-out

- Construction kickoff and coordination
- Progress inspection process
- Change order process
- Final acceptance inspection process
- Project close-out

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