



# Program Development Study Phase





# Program Development Study Phase

## The Long Life of the PDS

Years after its completion, the quality of the PDS continues to guide or constrain the project team's response to unforeseen conditions, the customer's revised needs, constructability issues, and ever-changing material and labor costs. In many ways, the PDS is the last chance to "get it right" (see Exhibit 5.2: Keys for PDS Success).

## Overview of the Program Development Study (PDS) Phase

The Program Development Study (PDS) phase provides GSA with a sound foundation to pursue the construction funding and design start for a project. A PDS is required for all GSA capital projects. In the typical project development and funding cycle, the PDS usually follows the Feasibility Study phase by two years. The PDS is also a good method to establish project requirements for Prospectus-level build-to-suit lease projects.

During the PDS phase, the project team, customer agency, and stakeholders use the PDS to develop the project described in the Feasibility Study in greater detail. The PDS reviews and revalidates (or revises) all previous project assumptions, plans, and budgets. It proposes a reliable construction budget and implementation strategy for the project.

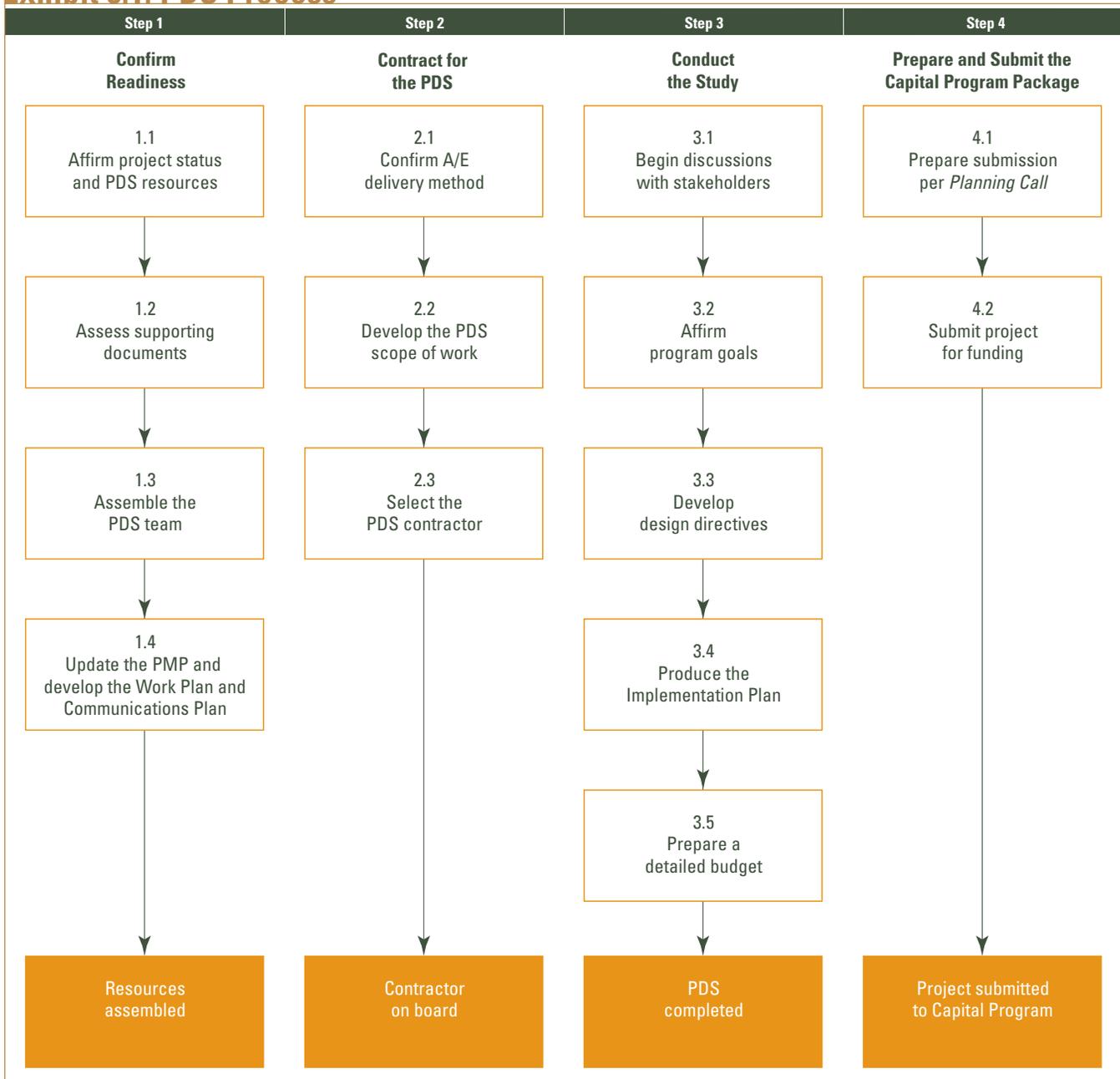
In GSA's Capital Investment and Leasing Program (CILP), the PDS serves as the "last chance" to ensure that the project has the proper scope and budget before requesting construction funding. It provides the foundation for the architect/engineer (A/E) to begin design and establish budget parameters for the design process.

### A successful PDS fulfills these key roles:

- Updates site information and costs, based on latest knowledge;
- Evaluates the Feasibility Study and other assumptions and confirms the best alternative;
- Identifies design directives to maximize the project's opportunities by proposing the optimal budget and scope;
- Identifies and minimizes constraints and risks by proposing the right budget and implementation strategy;
- Details the strategy, schedule, and budget for the procurement of construction services;
- Finalizes budgets for the shell, tenant improvement (TI), and security (e.g., progressive collapse, blast mitigation, glass fragmentation line items); and
- Provides detailed backup for the Construction Prospectus.

This section of the Guide summarizes PDS deliverables, describes the tools for conducting the PDS, and outlines a process to improve successful completion. (See Exhibits 5.1, 5.3, and 5.4.)

## Exhibit 5.1: PDS Process



## Exhibit 5.2: Keys for PDS Success

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### Emphasize the Project Management Plan (PMP)

Create a PMP at the beginning of the PDS process and revise it throughout. Use it as a tool to focus the efforts of the PDS team, the customer, and the contractor.

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### Keep the PDS Team Engaged

Assemble a broad-based team early and keep members involved. In-house GSA experts and customers are crucial to help set strategy, ensure an effective PDS, and manage expectations.

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### Re-Evaluate the Feasibility Study

Reconsider the Feasibility Study's assumptions and conclusions. Since its completion, customer needs, local context, site availability and costs, security, and other requirements and expectations may have changed significantly. Any of these may fundamentally alter the proposed project.

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### Customize the Scope of Work

GSA's standard scopes of work are an invaluable tool, but they are only a starting point. Ensure that the PDS is focused, complete, and on time by customizing the scope of work to meet the project's specific requirements.

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### Ensure In-House Knowledge

GSA's in-house team is called upon to answer questions in support of the project throughout the approval process—and they form the core of the future design team. They must have in-depth knowledge of the project to support it over the long term. This is especially true of economic analyses: The PDS contractor develops project costs, but the regional Office of Real Property Asset Management conducts the analyses required by the Capital Program.

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### Conduct the PDRI Process

Using the Project Definition Rating Index (PDRI) process can help to identify strengths and weaknesses in the PDS and Prospectus early on. See the *Planning Call* for more details on the process and its requirements.

## Program Development Study Phase

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### Recommended Activities

#### Step 1 *Confirm Readiness*

Reviews the project status, funding, and PDS team resources and how they contribute to the development of a viable Work Plan.

#### Step 2 *Contract for the PDS*

Develops the scope of work and selects the appropriate contractor.

#### Step 3 *Conduct the Study*

Prepares the PDS with help from stakeholders, the customer agency, and GSA associates.

#### Step 4 *Prepare and Submit the Capital Program Package*

Submits the completed package for construction funding.

### Outcome

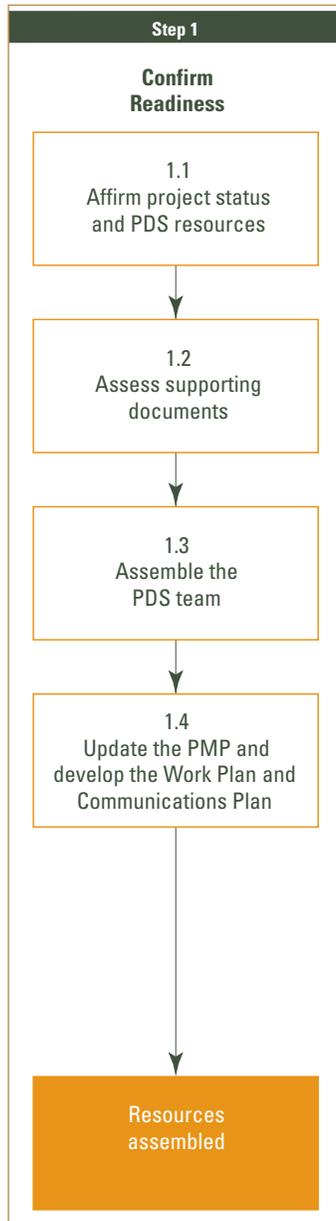
- Submission of a completed PDS and Construction Prospectus

### Duration

This task typically takes thirty-six (36) weeks. Factors impacting duration:

- The complexity of the project
- Changes to the conditions or requirements since completion of the Feasibility Study

# Step 1: Confirm Readiness



The Project Manager must review the project and confirm that it is appropriate to begin a PDS. This informal assessment is based on a review of the Site/Design Prospectus, site selection activities, the quality of previously conducted studies (including the Feasibility Study), the progress of the authorization process, and the availability of staff and resources to conduct an effective study.

Several years may have passed since the completion of the Feasibility Study. Many local, customer agency, and project conditions may have changed during the interim. The PDS should be an assessment of where the project is today and where the project needs to go. As a first step, the project team becomes well versed in the project's background and history in order to scope the appropriate PDS and guide it to completion.

## Recommended Activities

### 1.1 *Affirm project status and PDS resources*

Determine whether the time is right to begin the PDS.

### 1.2 *Assess supporting documents*

Assess validity of supporting documents and review project history.

### 1.3 *Assemble the PDS team*

Identify all required GSA and customer agency team members and ensure that the sufficient expertise is allocated for the PDS.

### 1.4 *Update the PMP and develop the Work Plan and Communications Plan*

Create a PDS Work Plan and Communications Plan in coordination with the overall PMP.

## Outcomes

- Clear direction for the PDS
- Identification of the resources and strategy to be successful
- Sufficient information to contract for the PDS

## Duration

This task typically takes three (3) weeks.

### 1.1 Affirm Project Status and PDS Resources

The Project Manager or team leader for the PDS reviews all project developments and determines whether it is the right time to begin a PDS. The availability of adequate resources to prepare the PDS also should be confirmed. This task is essentially the continuation of good project communications between the Regional Office and its customer agency in the period after submittal of the Site/Design Prospectus and joint planning for the PDS preparation.

#### Recommended Activities

*Check progress status of the Site/Design Prospectus.*

- Determine whether the project is still on track for submittal of the construction request in the planned fiscal year.

*Affirm that the customer agency supports the project.*

- Make certain that the customer agency is ready to support the construction request for the proposed year.
- Review the status and disposition of site selection and other project developments and confirm that the customer still supports the project and schedule proposed in the Feasibility Study.

*Assess changes to the project's fundamental requirements.*

- Determine whether the project's requirements have changed so significantly that the project needs to be reconceptualized.

*Confirm the timetable.*

- Confirm that the PDS can be funded and finished in time to support an effective Capital Program submittal.
- Check that sufficient BA61 (e.g., Regional Operating) funds are set aside to support preparation of the PDS.

#### Outcome

- Customer and regional management support for preparation of a successful PDS

#### Duration

This task typically takes one (1) week.

#### Who Leads the Team?

Although an Asset Manager generally leads the Feasibility Study, a Project Manager usually leads the PDS. This can vary from region to region.

### Document Review Precedes PDS Commencement

Ideally, each member of the project team assesses the available documents and their validity in light of current conditions and recommends any new data or studies that are needed.

## 1.2 Assess Supporting Documents

This task focuses on understanding the project's history and background in depth, rather than simply reviewing a host of documents. Conversations with those who are familiar with the project and its development can enhance the review. In order to build an effective team and create the scope of work for the PDS, the Project Manager and the team must begin with a thorough analysis of the Feasibility Study and the project's history.

### Recommended Activities

*Start with the Feasibility Study.*

- Identify issues or uncertainties that need to be developed more fully since the Feasibility Study was completed.
- Look for Feasibility Study assumptions that may have changed.

*Identify the key risks and opportunities.*

- Determine whether technical issues have been sufficiently analyzed and resolved in the Feasibility Study.
- Review the Project Management Plan (PMP). The PDS scope of work should respond to any outstanding risks.

*Review other studies and background information.*

- Check for and review any substudies referenced in the Feasibility Study. (See "Appendix B" for a list of typical Feasibility Study Input Documents.)
- Identify any special studies (e.g., seismic, blast, historic preservation, fire protection) that need to be completed or included in the PDS.

*Re-engage the project contacts from the Feasibility Study or its supporting studies.*

- Concentrate on key issues, uncertainties, and expectations.
- Contact others (GSA, the customer, and stakeholders) who can explain the background of the project's requirements. Some of these persons may join the PDS project team later; tap their knowledge now to help shape the approach and scope of work.

*Review site selection efforts and the Site Investigation Report.*

- Talk to the Site Investigation Team to learn more about conditions that may impact construction costs or about commitments for special studies or actions during construction.

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### Outcomes

- Familiarity with the project's background
- A basis for informed choices about the PDS team composition
- Identification of gaps in background documentation composition
- General direction to shape the scope of work

### Duration

This task typically takes one (1) week. Factor impacting duration:

- Availability of personnel and documents

### 1.3 Assemble the PDS Team

The entire team should be assembled now (even if some team members' expertise is not used until later in the PDS development). Each project uses a variety of GSA associates as resources. Their topic expertise and knowledge of specific project areas help to develop an effective PDS scope.

### Recommended Activities

*Develop a team roster.*

- Select a slate that pairs the project's issues with GSA expertise. Consult "Appendix E," which describes the roles and responsibilities of the team members, to develop the roster.

*Include customer agency representatives.*

- Rely on customer agency representatives to provide knowledge about the customer's requirements and to handle communications and coordination with the customer agency.
- Review any special needs or concerns discussed in the Feasibility Study and then include customer representatives with the right expertise to help shape and review the PDS.

*Leverage outside stakeholders as a source of local knowledge and support.*

- Determine whether there are issues or opportunities influenced by outside factors.
- Use stakeholders to bring local input into the PDS process. They can provide strategies for viable local approaches: funding additional construction costs through local or state agencies and coordinating with nearby utilities, road repair, local plans, or preservation features.

### Capitalize on Earlier GSA Participation

Don't overlook the significant advantages of involving the GSA experts who participated during the project's Feasibility Study, site selection, and Design Excellence review.

### Outcome

- Availability of GSA and other experts to shape the PDS scope of work

### Duration

This task typically takes two (2) weeks. Factor impacting duration:

- Availability of appropriate Feasibility Study team members and stakeholders for the PDS preparation

## 1.4 Update the PMP and Develop the Work Plan and Communications Plan

The Work Plan is a crucial tool to ensure that the PDS achieves its goals, stays within budget, and remains on schedule. The team leader is responsible for mapping out all of the tasks, determining who does what and when, and defining the deliverables for each step. Once the project begins, the team leader uses the Work Plan to troubleshoot the process, the deliverables, and the schedule.

Effective communications bring important benefits to the project by managing customer agency, stakeholder, and community expectations; building consensus; supporting the project schedule; and enhancing coordination within the team and with the customer agency. The Communications Specialist team member can assist the team leader and others with these activities.

### Recommended Activities

*Review the PMP that was submitted with the Feasibility Study.*

- Review the PMP's recommendations for design procurement and the implementation strategy as inputs to the Work Plan.
- Verify whether the PMP has been updated since the completion of the Site/Design Prospectus or the beginning of the design phase.
- Use the PMP to guide the PDS process. Don't limit the PMP update to the submission for the Capital Program. Drafting the PMP begins earlier in the capital development process, and the PMP is updated throughout the PDS activities. Update the PMP in concert with the development of the Work Plan.

*Use the PDS Checklist (see "Appendix D").*

- Refer to the PDS Checklist for a list of typical contents and tasks for a PDS. Not every project needs all of the elements in the PDS Checklist. However, using the PDS Checklist helps to review the project's requirements and select the appropriate PDS elements for each project.

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### *Review project background.*

- Review the project's characteristics. Identify unique factors about the project or the location that may impact the Work Plan and plan for their resolution in the scope, schedule, and budget.
- Review the project's history and local context.
- Verify coordination with other studies (either completed or ongoing).

### *Create a Work Plan for conducting the PDS.*

- Work with the PDS team to develop a Work Plan and schedule that includes these tasks: write the scope of work, begin the PDS, review progress, revise and finalize the PDS, and submit the project to the Regional Office's Capital Program. The schedule should conclude with the completion of the Regional Office's Capital Program submission of the project.
- Identify project decision-making processes and coordination requirements. Review the approval processes for GSA, the customer agency, local government, and others. Determine typical time frames and milestones and add this information to the project schedule.

### *Develop a Communications Plan for GSA stakeholders and the public.*

- Understand the context of the project and the community by reviewing previous communications approaches and strategies. Review contacts made with federal, state, and local agencies during the Feasibility Study.
  - .. Reviewing project and local history, local issues, and activities that may create interest or controversy, such as local elections and other development activities.
- Identify key stakeholders in terms of the following:
  - .. Organization (size and structure);
  - .. Project stake;
  - .. Level of influence and issues of interest; and
  - .. Leaders and spokespersons, for contact information.
- Include the Communications Plan in the PMP to cover the project duration.
- Include plans for involving various stakeholders (e.g., the customer agency, the community, local officials) in the PDS preparation.
- Plan to review the draft Work Plan with key stakeholders, including the customer agency, GSA Regional Office, and GSA Central Office. Confirm coordination requirements within GSA and among GSA, tenant agencies, and other outside organizations, such as local government and community organizations.

### **Key Advantages to Updating the PMP During the PDS**

- The team is more engaged and contributes more effectively.
- Early focus is on the final product.
- The PDS refines the PMP finalization.

### PMP's Role

The Project Management Plan (PMP) is a tool that supports effective project development. The Project Management Plan is separate from the PDS, but the two should be developed in tandem. The PMP saves far more effort over the life of the project than it takes to prepare. Consequently, it pays to prepare the PMP correctly.

### PMP Aid

Contact the OCA's Construction Excellence and Project Management Division for resources to help develop PMPs that will make each project successful.

- Provide a clear understanding of who does what, when, and why. Use this information to gain understanding, develop support, or announce progress, as appropriate.
- Identify project milestones.
- Develop a schedule of planned communications around project milestones, such as activity commencement and completion dates. Develop a protocol for tracking and responding to potential problems.
- Identify communications venues that may be used to distribute information about the project, such as the following:
  - .. GSA Web site and/or customer agency Web site or newsletter.
  - .. City or local agency Web site and local interest newsletters and Web sites.
  - .. Local newspapers, TV, and radio.
- Summarize this information and prepare the Communications Plan. Review the Communications Plan with the Site Investigation Team and the communications staff for the Region, GSA Central Office, and customer agency.

*Revise the current PMP during the PDS process.*

- Don't wait until the Capital Program to dust off the PMP. It should be updated continually throughout the process. The PDS scope of work can be tailored to address issues to support the project strategy.

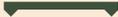
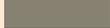
### Outcomes

- An effective strategy for conducting the PDS
- Development of the PMP in concert with the PDS
- Development of the Communications Plan with analysis of stakeholders, potential issues, and media venues

### Duration

This task typically takes two (2) weeks.

## Exhibit 5.3: PDS Process Schedule

Task Name	Duration
<b>Step 1: Confirm Readiness</b>	<b>3 weeks</b>
1.1 Affirm project status and PDS resources	1 week
1.2 Assess supporting documents	1 week
1.3 Assemble the PDS team	2 weeks
1.4 Update the PMP and develop the Work Plan and Communications Plan	2 weeks
<b>Step 2: Contract for the PDS</b>	<b>4 weeks</b>
2.1 Confirm A/E delivery method	1 week
2.2 Develop the PDS scope of work	1 week
2.3 Select the PDS contractor	2 weeks
<b>Step 3: Conduct the Study</b>	<b>26 weeks</b>
3.1 Begin discussions with stakeholders	26 weeks
3.2 Affirm program goals	4 weeks
3.3 Develop design directives	14 weeks
3.4 Produce the Implementation Plan	4 weeks
3.5 Prepare a detailed budget	4 weeks
<b>Step 4: Prepare and Submit the Capital Program Package</b>	<b>3 weeks</b>
4.1 Prepare submission per <i>Planning Call</i>	3 weeks
4.2 Submit project for funding	1 day
<p><b>Summary of Tasks</b> </p> <p><b>Task</b> </p> <p><b>Milestone</b> </p>	



## Step 2: Contract for the PDS

The Work Plan establishes the starting point to bring a qualified A/E contractor on board. The PDS team must use the latest project information to develop the appropriate scope of work and define the right firm for the work.

### Recommended Activities

#### 2.1 *Confirm A/E delivery method*

Review the Feasibility Study and PMP to determine whether the recommended A/E selection strategy is still viable.

#### 2.2 *Develop the PDS scope of work*

Begin with standard scopes and GSA expertise to craft the appropriate scope for each project.

#### 2.3 *Select the PDS contractor*

Work closely with the Contracting Officer to bring the A/E contractor on board for the PDS.

### Outcomes

- Development of a scope of work for the PDS
- Selection of A/E contractor

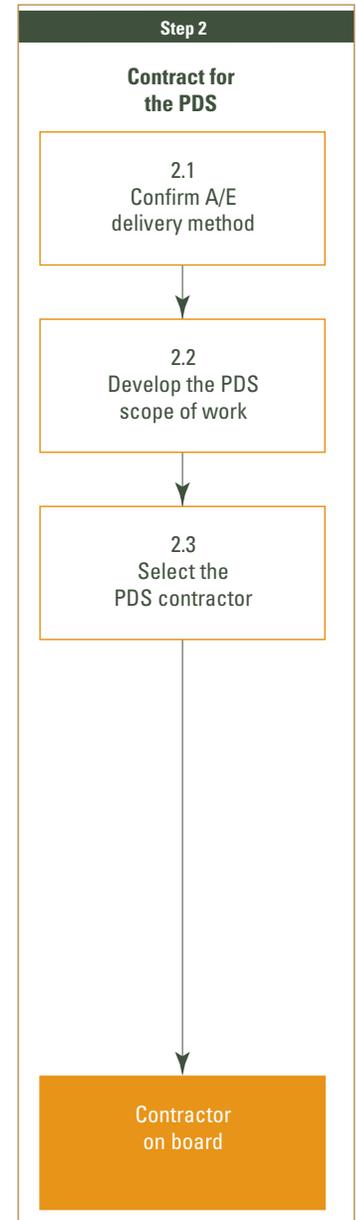
### Duration

This task typically takes four (4) weeks. Factor impacting duration:

- Adequate time to access a qualified existing IDIQ contractor or the Designer of Record

### 2.1 Confirm A/E Delivery Method

The Feasibility Study examined the advantages and disadvantages of design/build, traditional design-bid-build, and other methods and recommended the best implementation and procurement strategy for the project. The selected implementation strategy should influence the process for selecting the PDS contractor.



For most projects, the best course is to select the design A/E and Architect of Record through GSA's Design Excellence program and use the selected A/E to prepare the PDS before proceeding into design. However, other design procurement strategies may remain valid options for some projects (e.g., a limited-scope renovation that does not require a Feasibility Study or a design/build project). In those cases, another A/E may be contracted to complete the PDS.

### Recommended Activities

*Validate the A/E delivery method.*

- Review the Feasibility Study and the PMP to determine whether current conditions warrant following the recommendation or selecting a different process.

*Determine whether the project is a limited-scope renovation (such as for a single system); if so, include the A/E procurement method as part of the PDS.*

### Outcome

- Validation of A/E and PDS contractor procurement strategy

### Duration

This task typically takes one (1) week.

## 2.2 Develop the PDS Scope of Work

The most important task for the project team is preparing the scope of work. A carefully crafted scope of work defines the project's needs, provides Capital Program managers with the data to support the construction funding request, and delivers a document that guides the project through the early stages of design.

GSA has developed model scopes of work for renovation and new construction projects (see "Appendix F: GSA's Standard Scopes of Work"). Reviewing these standard scopes is a good starting point for defining the scope of work for the project. The PDS team must customize each project's scope to ensure that it addresses both project requirements and those of the relevant Capital Program.

## Exhibit 5.4: PDS Deliverables

The PDS must present the following information for decision-makers at GSA and at the customer agency and, ultimately, for stakeholders in the administration and in Congress.

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### Customer Agency's Business Goals

- Reviews the customer agency's business goals and their impact on facility requirements.
- Confirms that the project is needed, supports customer agency's business goals, and discusses the implications if the project is not completed.
- Reviews and validates alternatives from the Feasibility Study, addresses the impact on all affected GSA assets and interdependent projects, and explains customer-pricing implications.

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### Project Goals

- Refers to GSA's portfolio goals as the context for the project.
- Describes workplace performance goals, space assignments, and flexibility needs.
- Discusses facility operation, automation, materials handling, durability, and life-cycle costing requirements.
- Creates the housing plan, taking into consideration any special space requirements, required adjacencies and square footage, and potential response to future uncertainties.
- Includes directives to meet accessibility, historic preservation, urban development, and Design Excellence goals.

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### Building Requirements

- Lists goals for acoustic and indoor air quality, sustainable design, energy efficiency, water conservation, and moisture protection.
- Addresses risks posed by seismic activity, blast events, chemical and biohazards, fire, and other threats to persons and property under GSA's care.
- Describes site and surroundings, plus Design Excellence and urban development goals.
- Discusses operations and maintenance requirements, as well as GSA's Total Building Commissioning strategy.

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**Building Systems**

- Establishes design directives for foundations, structures, exterior walls and windows, flooring and roofing, internal partitioning, finishes, conveyance systems, plumbing, HVAC systems, fire protection, life safety, electrical service and distribution, lighting, communications and security systems, equipment and furnishings, site work and landscaping opportunities, and considerations for special construction and demolition.

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**Implementation Plan**

- Identifies key project milestones, stakeholders, funding sources, and uncertainties about or risks to the project's delivery.
- Proposes the project delivery method and assumptions.
- Discusses phasing and swing space requirements, potential agency interruptions, utilities coordination, construction phasing, and building turnover plans.
- Describes required stakeholder funding approvals, plus strategies for meeting environmental, historic preservation, and urban development requirements.

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**Cost Estimating**

- Provides project data, estimated construction costs (ECC), estimated total project costs (ETPC), estimated customer relocation costs, cost of shell improvements, cost of each tenant's TI, and the cost of security improvement (e.g., progressive collapse, blast mitigation, glass fragmentation) to meet GSA cost estimating requirements (currently based on Project Cost Estimate form UNIFORMAT II, Level 3). The OCA's Center for Courthouse Programs develops a construction benchmark for the projects proposing new courthouse construction.

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### Recommended Activities

*Review copies of model scopes of work.*

- Begin with the generic scopes of work provided through the OCA.
- Review the scopes of work used for similar projects and choose those elements that are appropriate for this project. Documents and project-specific guidance are available from the OCA's Construction Excellence and Project Management Division (see "Appendix G: GSA Organizations and Resources") and through other Project Managers in each region.

*Convene the PDS project team to help shape the scope of work.*

- Customize each project's scope to meet the project's latest specific requirements.
- Ensure that the scope fills in any gaps left by the Feasibility Study, paying special attention to previously identified issues and those that have come up since its completion.
- Determine whether the scope suits the program. The new courthouse or border station programs have highly developed benchmarking systems that supersede any other estimating methods. When using these models, it may be possible to streamline the PDS scope to concentrate on confirming conditions, procurement methods, and site issues, rather than on standard construction or program items.

*Customize the scope to meet the requirements of the relevant Capital Program.*

- Consult with the Office of Real Property Asset Management or the Regional Office representative from Real Property Asset Management to review the *Planning Call* issued for the planned funding year. Data requirements change from year to year (e.g., parking plans, courtroom matrices). Support the development of the Capital Program for the project by ensuring that the PDS presents key data in easily usable formats.

### Outcome

- A solid scope for professional services

### Duration

This task typically takes one (1) week. Factors impacting duration:

- The complexity of the project
- Requirements that deviate from the standard PDS scope of work

### Standard Scopes for PDSs

GSA has developed standard scopes of work for PDSs that support both renovation and new construction projects. These scopes of work provide detailed deliverables for PDSs and a "workbook" format to customize the PDS to meet each project's needs. Contact the OCA's Construction Excellence and Project Management Division for the latest documents.

### A/E Fee Adjustment

The A/E's fee may need to be adjusted as the PDS's scope definition and subsequent estimates provide more accurate details than the Feasibility Study's ECC. Plan a strategy to identify and address any scope changes during the development of the Construction Prospectus.

## 2.3 Select the PDS Contractor

The GSA Contracting Officer, a key member of the PDS team, shepherds the team through the contractor selection process. In a traditional Design Excellence procurement, the Architect of Record performs the PDS and designs the facility, so there is no separate procurement for a PDS contractor.

When another A/E delivery method is recommended (e.g., limited-scope systems project), it will be necessary to select a PDS contractor. In many cases, the PDS firm already may be on board or easily procured via a Regional Indefinite Delivery Indefinite Quantity (IDIQ) contract or other contracting mechanism.

### Recommended Activities

*Review capabilities of professional services firms.*

- Check the qualifications of firms already on board (e.g., IDIQ, FSS/MOBIS contracts) in light of the complexity of the project and required expertise.
- Take advantage of the expertise of the Contracting Officer and other Project Managers to evaluate the suitability of available contractors for this PDS.

*Establish the procurement timeline.*

- Check with the Contracting Officer about the time required to bring a firm on board. This varies significantly, depending whether the firm is under an existing contract or whether the PDS needs to begin a solicitation from scratch.

*Issue the RFP.*

- Use the scope of work created in the previous step (2.2), to issue the RFP.

*Award the job.*

- Receive offers, negotiate the terms, and award the contract.  
Complete procurement activities with the Contracting Officer.

### Outcome

- Issuance of a notice to proceed to the PDS contractor

### Duration

This task typically takes two (2) weeks. Factor impacting duration:

- Use of a non-IDIQ contractor

## Step 3: Conduct the Study

The PDS contractor is responsible for completing the study with the PDS team's input and guidance. GSA guides the PDS, coordinates reviews, and keeps the customer agency and stakeholders informed and involved. See "Chapter 2: What's Important and When" to help review and guide the PDS development.

The PDS scope of work provides the detailed blueprint for conducting the study. Following is a brief summary of some of the key steps.

### Recommended Activities

#### 3.1 *Begin discussions with stakeholders*

Use input from stakeholders to understand the customer agency, local context, stakeholders' concerns, and opportunities.

#### 3.2 *Affirm program goals*

Confirm or revise the program goals outlined in the Feasibility Study and update specific goals and targets.

#### 3.3 *Develop design directives*

Develop detailed design directives to support sound project implementation, appropriate budget, and phasing.

#### 3.4 *Produce the Implementation Plan*

Update the PMP to describe key project milestones, risk management strategies, and other relevant information.

#### 3.5 *Prepare a detailed budget*

Apply the most up-to-date project data to ensure that the proposed budget is sufficient to deliver the project.

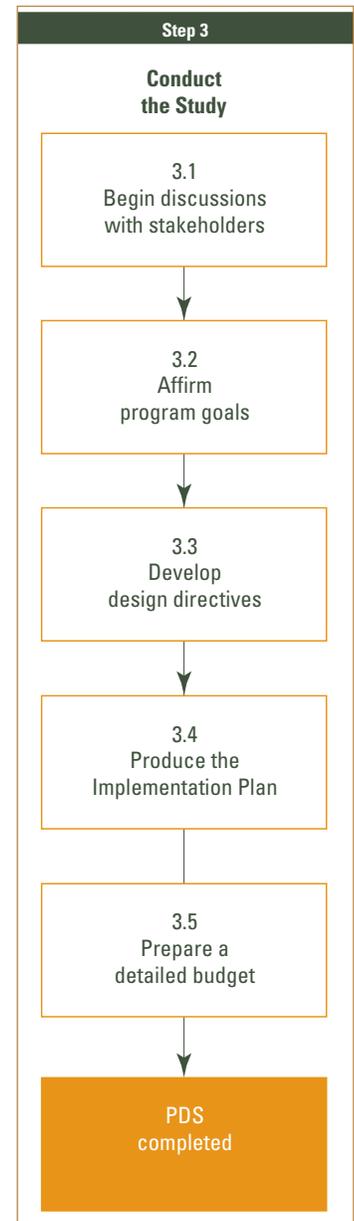
### Outcome

- A completed PDS

### Duration

This task typically takes twenty-six (26) weeks. Factors impacting duration:

- The complexity of the project
- The inclusion of specialized studies
- The time needed to review, digest, and develop the PDS into a solid funding proposal



### 3.1 Begin Discussions With Stakeholders

Use discussions with the customer agency and local communities to define development, construction, and phasing requirements and to understand the project's potential to support local planning and development activities.

#### Recommended Activities

*Meet with and engage project stakeholders.*

- Take advantage of meetings with the customer agency and local community to review project goals and local development goals.
- Identify opportunities for stakeholders to work together. Typical participants may include GSA Central Office, local government, local planning agencies, community groups, and the congressional delegation.
- Use Exhibit 5.5: Sample Agenda to help prepare for the meeting(s).

*Identify the control point for communications.*

- Select either the team leader or the Project Manager as the control point for all communications. Keep minutes or other reports for all meetings and phone calls.

*Coordinate all contact with local authorities through the appropriate GSA Regional staff.*

- Communicate regularly with the Regional Administrator.

*Identify other stakeholders.*

- Consider the need to meet with representatives of local government and civic organizations, including zoning boards, health departments, fine arts commissions, fire marshals, regional planning commissions, and local/urban design review boards, to ascertain construction design and issues.
- Explore the potential to leverage federal and local development efforts and to fine-tune the project's ability to support local needs.
- Contact the state environmental agency and State Historic Preservation Office, when appropriate, and discuss the project's compliance with state policies, programs, and regulations.

*Discuss the needs for publicity, press releases, and other communications activities.*

- Determine who will issue information that has been approved by the team leader and how inquiries and potential problems will be addressed.
- Review schedules for internal and external communications of project milestones.

## Exhibit 5.5: Sample Agenda

### Meeting With Customer Agency or Community

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1. Introduce attendees.
2. Review description of government project.
3. Briefly describe overall process, including earlier studies.
4. Review current PDS activities, purpose, outcome, and schedule.
5. Inquire about agency planning procedures, sources of information, and key program needs.
6. Identify potential opportunities and pitfalls (sites, local opportunities, timetable, phasing).
7. Assign next steps
  - Collect further data
  - Plan additional meetings
  - Establish points of contact

### Fine-tune the sample agenda, based on project history and timeline. Consider these points in preparing for the meeting(s):

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- Are the meeting participants familiar with the proposed project and the PDS process?
- Have they been involved in a PDS for other projects?
- Is there a previous working relationship between this group and GSA and the team leader? Is this a first-time meeting or a follow-up?
- What are the local impacts of the project? Consider the impact on urban design, job creation, transportation, growth, revitalization, and other local issues.
- Has there been any previous community involvement? What will be planned?

### Build Relationships With Allies

Local historic preservation groups yield an enormous amount of influence in many communities, and they can become great allies when brought on board early. It is never a good approach to bring them on board late.

### Outcomes

- Development of trust and consensus through ongoing dialogue with all project stakeholders
- Coordination of design and construction activities, based on local knowledge, customer agency and local input, and the process

### Duration

This task typically takes twenty-six (26) weeks and continues throughout the PDS process.

## 3.2 Affirm Program Goals

It is important to review and update the project goals identified in the Feasibility Study in light of current conditions and to evaluate their impact on the construction budget and Implementation Plan. Consider workplace performance goals, space requirements, sustainable design and energy usage targets, updated security and seismic requirements, compliance with historic preservation and environmental laws, and recommended coordination with local plans (see Exhibit 5.4: PDS Deliverables).

### Recommended Activities

*Affirm program goals.*

- Use input from the customer agency, GSA, and outside stakeholders.

*Provide specific targets.*

- Develop specific performance metrics or targets, as appropriate (e.g., LEED rating goals, energy usage) to evaluate success, as goals are updated or confirmed.

*Write goals carefully.*

- Ensure that goals are both sufficiently broad and appropriately detailed to guide effective design directives.

### Outcome

- Up-to-date goals for the project with sufficient detail to guide design directives

### Duration

This task typically takes four (4) weeks.

### 3.3 Develop Design Directives

Design directives provide micro-level alternatives to shape project decision-making and offer detailed direction for creating the project's design and budget.

#### Recommended Activities

*Match scope requirements with design directives.*

- Ensure that the PDS contractor develops design directives to meet the project goals and the requirements of the scope of work.

*Keep design directives on track.*

- Ensure that the design directives consider the most up-to-date project information, accomplish the defined project goals, and provide sufficient micro-level alternatives (e.g., systems choices, phasing options) for the project team.

*Coordinate with GSA headquarters.*

- Check in with stakeholders in the Office of Real Property Asset Management and the Office of the Chief Architect to understand submission requirements and project ranking factors.

#### Outcome

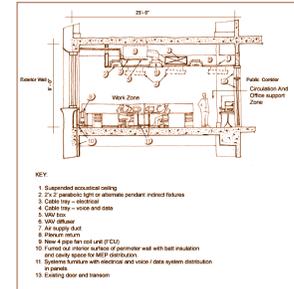
- Clearly defined design directives that describe the project's elements, implementation, and budget

#### Duration

This task typically takes fourteen (14) weeks.

### 3.4 Produce the Implementation Plan

The PDS provides an Implementation Plan for executing the project and its defined design directives. It describes key project milestones, funding sources, and uncertainties or risks that may affect project delivery. Beginning with an evaluation of the Feasibility Study, the PDS proposes phasing, swing space plans, and building turnover plans. The Implementation Plan must describe required stakeholder approvals and consultations, as well as strategies for meeting environmental, historic preservation, and urban development requirements.



#### Design Directives

To develop valid interior renovation engineering concepts for the PDS, the team develops options for the distribution of services (mechanical, electrical, voice, and data), the perimeter conditions at window wall, and the corridor.

#### Funding Cycles

When developing a project schedule, recognize both the limitations of the funding cycle and when funds become available.

### Check the *Planning Call*

See the latest *Planning Call* and the detailed cost-estimating tools provided with the *Planning Call*. Contact the Office of Real Property Asset Management to ensure that your PDS covers all of the bases.

### *Planning Call*

The *Planning Call* directs the requirements of the submission. It is important to anticipate and incorporate these requirements into the scope of work and throughout the process as they cannot be effectively “created” at the end of the process. When they are not included, significant revisions to the PDS may be required. In addition to the Prospectus, the required economic analyses, and final housing plans, team members also prepare an Environmental Checklist, the Project Management Plan, Occupancy Agreements, and other relevant documents during the same time period.

### Recommended Activities

*Review the PMP and Feasibility Study’s proposed implementation methods.*

*Assess key elements. Consider the design directives’ key factors.*

- Integrate the requirements of the schedule and known uncertainties with various coordination activities.

*Develop the Implementation Plan.*

- Use the plan to guide project phasing, construction procurement, and risk management.

*Incorporate key Implementation Plan strategies into the PMP.*

### Outcome

- A strategy to implement the project

### Duration

This typically takes four (4) weeks.

## 3.5 Prepare a Detailed Budget

The PDS must propose design directives that have sound budgets, including additional costs for phasing, swing moves, and site conditions, as well as standard construction costs. Estimates must meet the requirements laid out in the *Planning Call*, which, for PDSs, are currently based on UNIFORMAT II, Level 3.

### Recommended Activities

*Develop base costs.*

- Use the *Planning Call* as a guide, as well as industry estimating standards (such as Means).

*Consider additional costs.*

- Evaluate special conditions and the requirements of the Implementation Plan.

*Revise Occupancy Agreements.*

- Use the more detailed cost estimates and project budgets contained in the PDS.

### Outcome

- The most up-to-date construction costs to deliver the project

### Duration

This task typically takes four (4) weeks.

## Step 4: Prepare and Submit the Capital Program Package

The PDS team must stay engaged with the project as it is developed into a Prospectus funding proposal. Although the regional Office of Real Property Asset Management generally puts the package together, other team members prepare specific parts of the funding package, based on the requirements of the *Planning Call*.

The preparation of the Capital Program package will fill all available time (and that time will seem far too short). Work out reasonable delivery time frames with the regional Office of Real Property Asset Management. The complexity of the submission requirements seems to grow every year, so allow plenty of time to do it right.

### Recommended Activities

4.1 *Prepare submission per Planning Call*

4.2 *Submit project for funding*

### Outcome

- Capital Program submission that accurately and effectively represents the project

### Duration

This task typically takes three (3) weeks.

### 4.1 Prepare Submission per Planning Call

Consider *Planning Call* requirements and incorporate them into the development of the PDS.

### Recommended Activities

*Keep the PDS team involved.*

- The team may be needed throughout the development of the Capital Investment and Leasing Program (CILP) submission.

*Conduct a Project Development Rating Index (PDRI).*

- The PDRI assesses the strengths and weaknesses of the application.

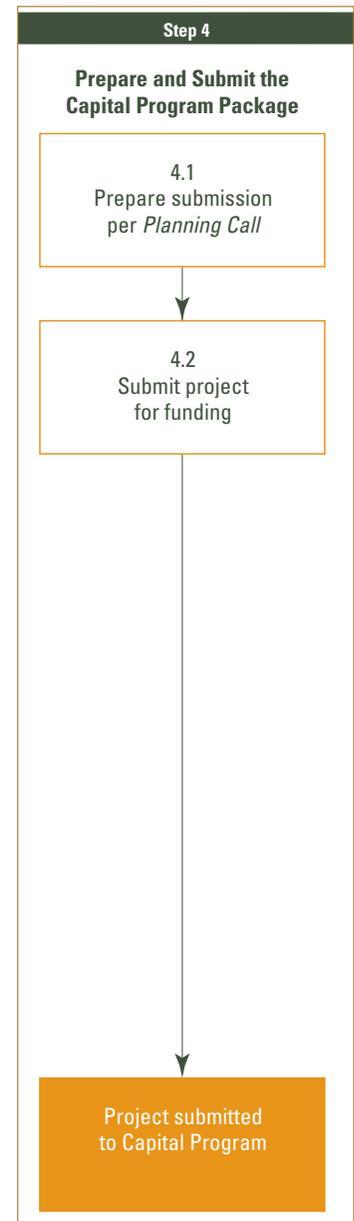
*Ensure that the PDS and supporting documents meet Planning Call requirements.*

### Outcome

- A logical, well-defined proposal for construction funding

### Duration

This task typically takes three (3) weeks.



## 4.2 Submit Project for Funding

Upon completion of the PDS and the Prospectus package, the Regional Office must prioritize the proposal along with the other projects it is submitting in that year's Capital Program.

### Recommended Activities

*Ensure that the project is well represented.*

- Be aware that a clearly defined Prospectus, with driving factors highlighted, has a stronger chance of receiving proper priority.

*Prepare to answer questions.*

- Be ready to respond promptly to Regional Management; GSA stakeholders in Washington, DC; and representatives in the OMB who may need additional detail or clarification.

### Outcomes

- Submission of project to Capital Program
- Committed and knowledgeable staff ready to answer questions as they arise

### Duration

This task typically takes one (1) day.