

# SLAT TI Allowance Checklist

Agency

Location

Square Footage

Project Number

OA Number

Lease Number

Contracting Officer

Leasing Specialist/RGA

Project Manager

Broker

Lease Action

Tab 1	Requirements Development	Notes	Status	Completed Date	In File?
A	SF-81 or Other Request for Space				
B	Requirements Development Documentation (Needs Interview Checklist, PM Documentation, etc.)				
C	Client Project Agreement (CPA) - Signed				
D	Agency Special Requirements (TI Allowance)				
E	GSA Pricing of TI Costs to Confirm Within TI Allowance				
F	Agency Lump Sum Funding Notification (anticipated TI overage)				
G	Vacant Federal Space Check				
H	Delineated Area				
	Delineated Area: Rural Development Act Compliance				
	Delineated Area: Justification of Delineated Area Outside CBA				
	Delineated Area: Contact with Local Officials (Written Notice or Consultation)				
	Delineated Area: Floodplain Consultation				
I	Performance Documentation for Current Location (Inspection Reports, LAM Comments, Tenant Satisfaction, etc.)				
J	Notice to FMSP re: Randolph Sheppard				

K	FSL Determination: Notification to FPS to Request FSL Determination				
	FSL Determination and Security Requirements				
L	Scoring Worksheets (or Scoring Memorandum for Lease Term < 5 years) - Initial				
M	Occupancy Agreement - Draft				
N	Bullseye Report				
O	Succeeding/Superseding Lease Analysis Tool				
P	Project Management & Acquisition Plan				
Q	Project Milestone Schedule				
R	Other: Requirements Development				
<b>Tab 2</b>	<b>Pre-Solicitation Phase</b>	<b>Notes</b>	<b>Status</b>	<b>Completed Date</b>	<b>In File?</b>
A	Advertisement using Procurement Summary Template posted in SAM Contract Opportunities				
B	Expressions of Interest				
C	Market Research				
D	Memo to File to Document the Absence of Competition				
E	Other: Pre-Solicitation				
<b>Tab 3</b>	<b>Solicitation Phase</b>	<b>Notes</b>	<b>Status</b>	<b>Completed Date</b>	<b>In File?</b>
A	Draft RLP Package, including Lease, Special Requirements, and Security Standards				
B	Technical Review of Draft RLP Package				
C	Agency Approval of Draft RLP Package				
D	RLP Package Distribution List (Including Transmission to Agency, GSA Field Office, and FPS)				
E	Cover Letter and Procurement Summary Form				
F	RLP Package with Attachments - Final				
G	Posting of RLP Package on SAM Contract Opportunities				
H	Amendments to RLP Package				
I	Correspondence with Offerors Prior to Receipt of Proposals				
J	Other: Solicitation				
<b>Tab 4</b>	<b>Pre-Negotiation</b>	<b>Notes</b>	<b>Status</b>	<b>Completed Date</b>	<b>In File?</b>
A	Negotiation Objectives (Tab 4)				

B	Competitive Range Determination / Notification				
C	Request for Contractor Support Services for Lease Acquisition (e.g. CQM, Furniture Vendors, Etc.)				
<b>Tab 5</b>	<b>Unsuccessful Offer(s)</b>	<b>Notes</b>	<b>Status</b>	<b>Completed Date</b>	<b>In File?</b>
A	Offer and Related Correspondence - Initial (Tab 5)				
B	Offeror's Proof of Property Ownership (Tab 5)				
C	Offeror's Proof of Authority to Represent Ownership Entity (Tab 5)				
D	Scaling/Measurement of Offered Space Floor Plans (Tab 5)				
E	Present Value Analysis (PVA) Evaluation - Initial Offer (Tab 5)				
F	Notice of Deficiencies/ Discussions/ Negotiations (Tab 5)				
G	Offer and Related Correspondence - Revised (Tab 5)				
H	Pre-Award Notice and Rejection Letters				
I	Post-Award Notice to Unsuccessful Offeror(s)				
J	Post-Award Debriefings/Congressional Inquiries and Responses				
K	Protests and Resolution				
L	Other: Unsuccessful Offer(s)				
<b>Tab 6</b>	<b>Successful Offer and Award Determination</b>	<b>Notes</b>	<b>Status</b>	<b>Completed Date</b>	<b>In File?</b>
A	Offer and Related Correspondence - Initial (Tab 6)				
B	Due Diligence Letter				
C	Offeror's Proof of Property Ownership (Tab 6)				
D	Offeror's Proof of Authority to Represent Ownership Entity (Tab 6)				
E	System for Award Management (SAM) (Tab 6)				
	System for Award Management (SAM): Active Registration Check (All Awards) (Tab 6)				

	System for Award Management (SAM): Exclusion Check (Tab 6)				
	System for Award Management (SAM): Online Representations and Certifications (Reviewed and Included in File) (Tab 6)				
	System for Award Management (SAM): Foreign Ownership Entity Check (Tab 6)				
F	Foreign Ownership Notice to Agency				
G	Abstract of Offers (Tab 6)				
H	Building Tour and Agency Concurrence				
I	Scaling/Measurement of Offered Space Floor Plans (Tab 6)				
J	Present Value Analysis (PVA) Evaluation - Initial Offer (Tab 6)				
K	Notice of Deficiencies/ Discussions/ Negotiations (Tab 6)				
L	Offer and Related Correspondence - Revised (Tab 6)				
M	Approved Small Business Subcontracting Plan including Checklist				
N	LCRM Pre-Award Assessment				
O	Request for Final Proposal Revisions (Tab 6)				
P	Offer and Related Correspondence - Final (Tab 6)				
Q	Present Value Analysis (PVA) Evaluation - Final Offer (Tab 6)				
R	Energy Star Label or Cost Effective Energy Efficiency Upgrades (if Exception Applies)				
S	Price Negotiation Memorandum (PNM) or Lease Action Summary				
T	Scoring Evaluation - Revised				
U	Historic Preservation Compliance Check (Tab 6)				
V	Fire Protection & Life Safety Review of Prelease Submittals (Tab 6)				
W	Seismic Review & Certification				

X	Floodplain Check & Compliance (Tab 6)				
Y	Negotiations of Environmental Remediation				
Z	NEPA Compliance (Tab 6)				
AA	Responsibility Check				
	Responsibility Check: 2nd Exclusion Check via SAM				
	Responsibility Check: Past Performance				
	Responsibility Check: Financial Responsibility				
AB	Other: Successful Offer and Award Determination				
<b>Tab 7A</b>	<b>Approval and Funding Documents</b>	<b>Notes</b>	<b>Status</b>	<b>Completed Date</b>	<b>In File?</b>
A	Occupancy Agreement (OA) and Agency Recommendation Letter Signed by Agency - Revised				
B	Receipt of RWA and Required Certification (required for TI exceeding the allowance) (Tab 7A)				
C	BA53 Final Pre-Award Fund Certification				
D	Lease - Draft				
	1364: Successful Offer - Final				
E	Other: Approval and Funding Documents				
<b>Tab 7B</b>	<b>Lease</b>	<b>Notes</b>	<b>Status</b>	<b>Completed Date</b>	<b>In File?</b>
A	Lease Transmittal - Pre-Award (unsigned)				
B	Lease Transmittal - Award (executed)				
C	Lease - Executed				
D	Confirmation of Lease Delivery to Lessor				
E	Lease Amendment - Draft				
F	Lease Amendment - Executed				
G	Other: Lease				
<b>Tab 8</b>	<b>Post Award Notifications</b>	<b>Notes</b>	<b>Status</b>	<b>Completed Date</b>	<b>In File?</b>
A	Posting of Award Synopsis on SAM Contract Opportunities				
B	Lease Distribution to Agency, Field Office, and FPS				
C	Non-Fully Serviced Lease Information Worksheet to PMC				
D	Randolph Sheppard Post-Award Notification to FMSP				

E	Notification and Transmittal of Approved Small Business Subcontracting Plan to SBA Area Director				
F	Other: Post Award Notifications				
<b>Tab 9</b>	<b>Post Award</b>	<b>Notes</b>	<b>Status</b>	<b>Completed Date</b>	<b>In File?</b>
A	Design Intent Drawings (DIDs) - Approved				
B	Fire/Safety Review and Approval of DIDs				
C	Finish Selections to Lessor				
D	Construction Drawings from Lessor				
E	Construction Drawing Review by Government				
F	Lessor's TI Construction Bids on TICS Table				
G	Government Review of TI Costs and/or IGE				
H	TI/BSAC PNM				
I	Receipt of RWA and Required Certification (required for TI exceeding the allowance) (Tab 9)				
J	TI/BSAC Notice to Proceed Issued				
K	Construction Inspection Reports/Meeting Minutes/Submittals				
L	Small Business Subcontracting Reports (ISRs and SSRs)				
M	Change Orders Related to Initial Occupancy				
N	Acceptance of Space				
	Acceptance of Space: Space Measurement Verification				
	Acceptance of Space: Certificate of Seismic Compliance				
	Acceptance of Space: Certificate of Occupancy				
	Acceptance of Space: Condition Survey Report (or Similar Document) Signed by GSA, Agency and Lessor				
	Acceptance of Space: Punch List and Resolution				
	Acceptance of Space: Build Out Cost Reconciliation				
O	Periodic Services Schedule				
	Periodic Services Schedule to Lease Administration Manager				
P	Lease COR Letter(s)				

	COR Letter Transmitted to Designated Agency Representative or Field Office				
	COR Letter Transmitted to Lessor				
Q	Occupancy Agreement (OA) and Evidence of Transmittal to Agency - Final				
R	CAD As-Builts to CIFM				
S	Other: Post Award				
<b>Tab 10</b>	<b>Administration</b>	<b>Notes</b>	<b>Status</b>	<b>Completed Date</b>	<b>In File?</b>
A	Operating Cost Escalations				
B	Change of Ownership/Novation				
C	Proof of Ownership				
D	Lease Digest (R620) (Tab 10)				
E	RWA's Properly Certified				
F	Miscellaneous Correspondence				
G	Appeals/Claims/Disputes				
	Appeals/Claims/Disputes: Correspondence				
	Appeals/Claims/Disputes: Contracting Officer Decision				
	Appeals/Claims/Disputes: Resolution				
	Appeals/Claims/Disputes: Unresolved Claim(s)				
	Appeals/Claims/Disputes: Civilian Board of Contract Appeals or Claims Court Decision				
	Appeals/Claims/Disputes: Payment				
H	Real Estate Tax: Checklist				
	Real Estate Tax: Other Supporting Document				
	Real Estate Tax: Tax Invoice				
	Real Estate Tax: Bill				
	Real Estate Tax: Evidence of Payment/Receipt				
	Real Estate Tax: Analysis Worksheet				
	Real Estate Tax: Letter				
	Real Estate Tax Notice: Appeal				
	Real Estate Tax Notice: Change in Building Assessment				
	Real Estate Tax Notice: Change in Tax Rate				
	Real Estate Tax: Lessor's Request for Approval to Appeal				
I	Other: Administration				