

Renewal Lease File Checklist

Added or Unpriced Evaluated Prior to Exercising

AGENCY: _____

LOCATION: _____

SQUARE FOOTAGE: _____

PROJECT NUMBER: _____

OA NUMBER: _____

LEASE NUMBER: _____

LEASE ACTION TYPE: _____

CONTRACTING OFFICER: _____

LEASING SPECIALIST/RGA: _____

PROJECT MANAGER: _____

PHONE NUMBER: _____

RENEWAL OPTION EXERCISE NOTICE (DAYS): _____

RENEWAL OPTION EXERCISE NLT (DATE): _____

I (A). REQUIREMENTS DEVELOPMENT AND DUE DILIGENCE		LDG or Other Policy Reference	Required	Note	Document In File
A.	Client Project Agreement (CPA) - Signed or Documentation to Confirm Continuing Need	Ch 9. 5a.			
B.	COR - LAM Consultation	Ch 9. 5c.			
	B.1 Notification to COR - LAM of Intent to add a Renewal Option				
	B.2 COR - LAM Response (Cyclical Service Review/Past Performance/Deferred Maintenance Issues)				
C.	Fire Protection and Life Safety Consultation	Ch 9. 5c.			
D.	Historic Preservation Compliance Check				
E.	NEPA Compliance	Ch 9. 5d.			
	F. Floodplain Check & Compliance	Ch 9. 5d. GSA Floodplain Management Desk Guide			
G.	Prospectus: Submission/Approval (House and Senate Resolutions)	Ch 9. 2.a			
H.	Project Management & Acquisition Plan	Ch 9. 6a./Lease Alert			
I.	Other: Requirements Development and Due Diligence				
I. (B) LEASE AMENDMENT TO ADD OPTION					
A.	Market Analysis	Ch 9. 6d.			
B.	Negotiation Objectives	Ch 9 6d.			
C.	Request for Offer to Lessor	Ch 9 6d.			
D.	Offer and Related Correspondence				
E.	Discussions/Negotiations	Ch 9 6d.			
F.	LCRM Pre-Award Assessment				
G.	Price Negotiation Memorandum (PNM) or Lease Action Summary	Ch 9 6d.			
H.	Lease Amendment Draft - Add Option	Ch 9. 6e.			
I.	Lease Amendment (LA) Transmittal - Add Option (Unexecuted)	Ch 9. 6e.			
J.	Lease Amendment (LA) Transmittal - Add Option (Executed)	Ch 9. 6e.			
K.	Lease Amendment - Add Option (Executed)	Ch 9. 6e.			
L.	Other: Lease Amendment to Add Option				
II. GSAR REQUIREMENTS FOR UNEVALUATED RENEWAL OPTION		LDG or Other Policy Reference	Required	Note	Document In File
A.	Beta.SAM Advertisement using Procurement Summary Template	Ch 9. 6b.		For added renewals over 10,000 ABOA SqFt	
B.	Justification for Other Than Full and Open Competition (JOTFOC) or SLAT Level Memo to File and supporting documentation (e.g. Cost Benefit Analysis)	Ch 9. 6c.			
C.	Other: GSAR Requirements for Unevaluated Renewal Option				
III. RENEWAL AWARD DETERMINATION DOCUMENTS		LDG or Other Policy Reference	Required	Note	Document In File
A.	Notice of Space Deficiencies			Address cyclical maintenance and any FPLS Issues with Lessor - Lessor must agree to correct any deficiencies as part of renewal option.	
B.	Market Analysis	Ch 9. 5h. 6d.			
C.	LCRM Pre-Award Assessment	Leasing Alert 4/25/16			
D.	Fair and Reasonable Determination	Ch 9. 5i. 6d.			
E.	Scoring Worksheets (or Scoring Memorandum for Lease Term < 5 years) - Initial	Ch 9. 5f.			
F.	System for Award Management (SAM): Active Registration Check (All Awards)	Ch 9. 5j.			
G.	System for Award Management (SAM): Exclusion Check	Ch 9. 5j.			
H.	Other: Renewal Award Determination Documents				
IV. (A) APPROVAL AND FUNDING DOCUMENTS		LDG or Other Policy Reference	Required	Note	Document In File
A.	Occupancy Agreement (OA) - Signed by Agency	Ch 9. 5k.			
B.	BA53 Final Pre-Award Fund Certification	Ch 9. 5m.			
	C. Unilateral Lease Amendment Providing Notice Exercising Option (Draft)	Ch 9. 5n. 6g.		Draft for BA53 funds certification	
D.	Other: Approval and Funding Documents				

IV. (B) DOCUMENTS TO EXERCISE OPTION		LDG or Other Policy Reference	Required	Note	Document In File
A.	Unilateral Lease Amendment Providing Notice Exercising Option (Signed by LCO) - Transmittal	Ch 9. 5o. 6g.		Transmittal of unilateral LA	
B.	Unilateral Lease Amendment Providing Notice Exercising Option (Signed by LCO)	Ch 9. 5o.		LCO issues notice via unilateral LA (signed by LCO only); also serves as an administrative record of the contract action. Lessor's signature is not required on ULA. Notice must be timely.	
C.	Other: Lease Amendment Execution				
V. POST EXECUTION NOTIFICATIONS		LDG or Other Policy Reference	Required	Note	Document In File
A.	Posting of Redacted Justification for Other Than Full and Open Competition on Beta.SAM	Ch 9. 5r. 6h.			
B.	Copy of Correspondence Transmitting Lease Amendment to Field Office	Ch 9. 5q.			
C.	Copy of Correspondence Transmitting Lease Amendment to Agency	Ch 9. 5q.			
D.	Copy of Correspondence Transmitting Lease Amendment to FPS	Ch 9. 5q.			
E.	Other: Post Execution Notifications				
VI. PROJECT COMPLETION/CLOSURE		LDG or Other Policy Reference	Required	Note	
A.	Lease Digest (R620)				
B.	Occupancy Agreement (OA) and Evidence of Transmittal to Agency - Final				
C.	Other: Project Completion/Closure				
VII. ALTERATIONS ASSOCIATED WITH RENEWAL		LDG or Other Policy Reference	Required	Note	
A.	Scope of Work for Alterations/Improvements	Ch 8		Confirm that paint and carpet refresh is not already provided under the contract	
B.	IGE for the Alterations/Improvements	Ch 8			
C.	Receipt of RWA and Required Certification	Ch 8			
D.	Request for Offer to Lessor	Ch 8			
E.	Offer and Related Correspondence	Ch 8			
F.	Notice of Deficiencies/Discussions/Negotiations	Ch 8			
G.	Price Negotiation Memorandum and related documentation (e.g. Fair and Reasonable Determination)	Ch 8			
H.	Draft Lease Amendment and Transmittal to Lessor	Ch 8			
I.	Executed Lease Amendment	Ch 8			
J.	Transmittal of Executed Lease Amendment to Lessor				
K.	Copy of Correspondence Transmitting Lease Amendment to Field Office				
L.	Copy of Correspondence Transmitting Lease Amendment to Agency				
M.	Finish Selection				
N.	Acceptance of RWA work - [for example: GSA Form 220 (Inspection Report for Work Under Contract), GSA Form 1204 (Condition Survey Report)].	Ch 8		Scalable: email from LAM could suffice for very minor alterations; GSA Form 1204 signed by all parties highly recommended for extensive alterations	
O.	Payment	Ch 8			
P.	Other: Alterations Associated With Renewal				