

NEW SPACE BASE SERVICE TASK LIST

The following task list includes the typical set of Leasing and Design services to be provided by DES Real Estate Services (RES) on a New Space project and is included in the reimbursable [Service Fees](#). Generally, if the new space lease is under 5,000 square feet, DES will use a market search process to solicit for proposals. New space over 5,000 square feet will use the Request for Proposals (RFP) process to solicit for proposals.



A) **Initiate/Define**

1. RES management reviews Modified Pre-Design (MPD) after receipt from Office of Financial Management (OFM)
2. Project is assigned to a RES leasing agent and design staff member
3. Review of MPD by RES leasing agent, RES design staff member and customer agency¹
4. Schedule meeting to discuss project scope and development of plan of action

B) **Charter**

1. New Space Charter document compilation. The charter summarizes all the project details including;
 - Project Information
 - Project summary
 - RES market analysis
 - Space use information
 - Timeline for new space project
 - Project risks

C) **Market/Solicitation**

1. Prepare request for proposal (RFP)/advertisement (dependent on space size)
2. Prepare agency specific Leased Space Requirements (LSR) addendum and other requirements
3. RFP/advertisement reviewed by customer agency, RES, and Office of Financial management (OFM).
4. Finalize RFP/advertisement and post to Washington Electronic Business Solutions (WEBS), the DES web page, and in local newspaper

D) **Evaluation of Proposals & Site Selection**

1. Receive responses to the RFP from proposers
2. Complete administrative screening to verify that the proposal(s) meet the administrative requirements. Contact proposers for clarification if needed
3. RES approval of the list of proposals administratively qualified and non-qualified proposals
4. Notify administratively qualified and non-qualified proposers
5. Review of proposals by project team
6. Conduct site tours and team evaluation
7. Determine which proposals could potentially meet the project requirements and invite those proposers to participate in Phase III (confirm final offer) by submitting a revised proposal
8. Evaluate proposals and select an apparent successful proposer (ASP)
9. Notify unsuccessful proposers
10. Prepare and distribute Letter of Notification to ASP- include clarifications and/or pre-conditions if needed

E) **Negotiate**

1. Negotiate with ASP if necessary
2. Discuss negotiations with agency
3. Draft Agreement to Negotiate (ATN)
4. ATN reviewed by client agency
5. Upon execution of ATN, RES design team staff to proceed with space planning/design

¹ Customer agency includes agencies, community and technical colleges, boards and commissions

F) Design

1. Receive, review and verify as-built drawings from ASP (if existing space)
2. RES design staff to assist agency in developing schematic design
3. RES design staff to provide drawings and specifications as exhibits to the lease
4. Confirm BOMA measurements
5. Review with customer agency and sign drawings
6. Send final drawings and specifications to ASP for construction costing
7. ASP to prepare Construction Bid Cost Breakdown
8. RES design staff to review costs on Construction Bid Cost Breakdown sheet
9. RES design to negotiate costs as needed
10. Final cost to be approved by ASP; RES design team manager, and customer agency

G) Execute Lease

1. Finalize lease negotiations
2. Prepare approval documents as required for OFM and/or DES deputy director
 - Leases over five years require DES Deputy Director approval
 - Leases over ten years require OFM approval
 - Leases that exceed \$1 million annually require OFM approval
 - Leases over 20 years require legislative approval
3. Prepare draft lease and exhibits
4. Obtain agency approval of final draft lease
5. Send lease and exhibits to lessor for signature
6. Lease executed by lessor
7. Lease signed by RES leasing agent as recommended for approval
8. Lease executed by RES Assistant Attorney General (AAG) and RES Assistant Director
9. Issue notice to proceed with construction to lessor

H) Construction

1. Pre-construction meeting: RES design team staff to discuss communication process and expectations
2. RES design team staff and customer agency to meet regularly on site (construction meetings)
3. Submittal review and approval
4. RES design team staff to review and approve change orders as required
5. Ongoing construction management and coordination
6. Punch list inspections
7. Final inspection
8. Notification of substantial completion and authorization of tenant agency occupancy issued by RES design team staff
9. Final construction documents/certifications from lessor reviewed by RES design team staff
10. Authority to pay construction costs issued by RES design team staff

I) Closeout

1. Closeout notification of prior lease to agency and prior lessor as necessary
2. Final walk through of prior lease site with conditions noted
3. Cancellation of prior lease