



Lease Liaison 4th Quarter Meeting

June 25, 2019



Greetings/Introductions

Michele Stevens
Bureau Chief of Leasing

Ice Breaker



Tia Miller
Leasing Administrator



AMP/CAA Process Improvement Training

Ryan Meikenhous



- **The Department of Management Services (DMS) currently utilizes two processes to assist agencies with project management and renovations.**
- 1. Agency Renovation Request (ARR)**
 - 2. Client Agency Agreement (CAA)**



Improved processes for improving your space.

Existing Process



New Process



Ryan Meikenhous



AMPs will be utilized for the following scopes of work:

- **Painting interior walls or ceilings**
- **Painting interior doors, frames, and cabinets**
- **Painting floors**
- **Replacing flooring**
- **Replacing interior doors/frames/glazing/hardware/keying**
- **Replacing, removing, or adding window coverings**
- **Replacing, deleting, or adding cubicle components**
- **Projects that do not require permitting**

Ryan Meikenhous



- ✓ New simplified forms
- ✓ Landing page
- ✓ Shared inbox

Effective July 1, 2019

Ryan Meikenhous



Questions



Ryan Meikenhous



Informal Procurement 101

Michele Stevens
Bureau Chief of Leasing

Checklist

Agency Review Checklist			
New Leases Less than 5,000 SF			
DMS LEASE SPECIALIST:		TRIRIGA ID:	
AGENCY LEASE LIAISON:		NEW LEASE NUMBER:	
LOCATION:		PREVIOUS LEASE NUMBER:	
TENANT BROKER:		EFFECTIVE DATE:	
SQUARE FOOTAGE:			
RSN APPROVAL (Request for Space Need) TRIRIGA			
<input type="checkbox"/> Check Adversely Affected Lessors/Excess Space ⁽¹⁾ (Current list on DMS Pre-approved Forms Website) <input type="checkbox"/> Check for State-Owned Space ⁽²⁾ (If available, not suitable for needs acknowledgment must be provided) <input type="checkbox"/> Request must match Agency's Annual Data Gathering Plan (Submit update via email if necessary) <input type="checkbox"/> Submit RSN in TRIRIGA (Please complete <u>ALL</u> fields) <input type="checkbox"/> Space Allocation Worksheet (SAW) FM-4100 <input type="checkbox"/> Boundary Map & Scatter chart of client base (Submit map of boundaries noting NSEW boundaries)			
PRIOR APPROVAL All approval packets greater than 15 pages must be mailed or hand delivered.			
<input type="checkbox"/> Copy of blank QSP <input type="checkbox"/> Three Separate Quotes FM-4098 ⁽³⁾ (see requirement per Chapter 80H-1.016, F.A.C.) <input type="checkbox"/> Quote Synopsis FM-4137A (Must include justification for site selected and Agency signature) <input type="checkbox"/> Net Present Value (NPV) Calculation (DMS Pre-approved Lease Forms Website) <input type="checkbox"/> Certification of Compliance FM-4113 (Authorized Signature Required) <input type="checkbox"/> Proof of Ownership (e.g. Recorded Deed) <input type="checkbox"/> Unexecuted Lease Documents (e.g. Standard Lease Agreement FM-4054) <input type="checkbox"/> Unexecuted Disclosure Statement FM-4114 ⁽⁴⁾ <input type="checkbox"/> Employment Eligibility Verification (E-VERIFY FORM) FM-4054K (Required for all Governor's Office directed agencies, pursuant to Executive Order 11-02) <input type="checkbox"/> Compare Lease data to approved RSN			
FINAL APPROVAL All approval packets greater than 15 pages must be mailed or hand delivered.			
<input type="checkbox"/> Executed Lease Documents (Authorized Signature Required, "entered into" dates to be completed by DMS) <input type="checkbox"/> Executed Disclosure Statement <input type="checkbox"/> Energy Performance Analysis ⁽⁵⁾ (Must provide to DMS prior to occupancy. Not required for conditioned and/or unconditioned storage.) <input type="checkbox"/> Fire Marshal Approval ⁽⁶⁾ (Must provide to DMS prior to occupancy) <input type="checkbox"/> Executed Tenant Broker Commission Agreement FM-4097 <input type="checkbox"/> Tenant Broker Evaluation Worksheet (DMS Pre-approved Lease Forms Website)			
<small> ⁽¹⁾ If space is available, justification must be provided as to why the space does not meet Agency needs. ⁽²⁾ If state-owned space is available within the geographic region, Agency must justify the use of private space, see Chapter 80H-1.002(2)(c), F.A.C. ⁽³⁾ Each quote must contain the information required in Chapter 80H-1.016(1)(a)-(i), F.A.C. ⁽⁴⁾ Sections 1-3 must be completed with owner information on the disclosure statement. ⁽⁵⁾ Required for leases of 2,001 sq. ft. or greater per Section 255.254, Florida Statutes, All Lease Actions ⁽⁶⁾ Required by Section 255.25(5), Florida Statutes </small>			

Michele Stevens & Tia Miller
Bureau Chief of Leasing

RSN Approval Process

- **Check Adversely Affected Lessor**
- **Check for State-Owned Space**
- **Ensure Annual Data Gathering Matches Request**
- **Submit RSN through TRIRIGA**
- **Submit Space Allocation Worksheet (SAW)**
- **Submit Boundary Map & Scatter Chart of Client Base if applicable**

Prior Approval Process

- **Submit Original QSP to the Tenant Broker**
- **Three Separate Quotes (FM-4098)**

60 H-1.016- For all leases under 5,000 square feet at least three documented quotes are required which must have the following information: (see next slide)

Quote Requirements Per 60 H-1.016

- (a) Prospective leased premises building name, if applicable; and**
- (b) Property physical and mailing address; and**
- (c) Prospective landlord full name and business address; and**
- (d) Proposed Net Usable Square Feet being offered; and**
- (e) Proposed rate per Net Usable Square Foot for each year of the term of the lease; and**

Rulemaking Authority 255.249(9) FS. Law Implemented 255.249(2), (9), 255.25(2)(a), (8), 255.257(4) FS. History—New 4-29-10.

Jerry Thornbury
Savills

Quote Requirements Per 60 H-1.016 Continued.....

(f) Proposed term in years; and

(g) Date proposed leased space will be available; and

(h) Proposed tenant improvement amount to be offered; and Proposed landlord's agent or representative, if applicable; and

(j) Whether the proposed facility is an “Energy Star” qualified facility as defined by the United States Environmental Protection Agency and the United States Department of Energy.

Rulemaking Authority 255.249(9) FS. Law Implemented 255.249(2), (9), 255.25(2)(a), (8), 255.257(4) FS. History—New 4-29-10.

Prior Approval Process Continued.....

- **Quote Synopsis (FM-4137A)**
- **Net Present Value (NPV)**
- **Certification of Compliance (FM-4113)**
- **Proof of Ownership**
- **Unexecuted Lease Documents**
- **Unexecuted Disclosure Statement (FM-4114)**
- **Employment Eligibility Verification Form (FM-405K)**
- **Compare Lease Data to RSN**

Prior Approval Process Continued.....

- **Unexecuted Lease Documents**
- **Unexecuted Disclosure Statement (FM-4114)**
- **Employment Eligibility Verification Form (FM-405K)**
- **Compare Lease Data to RSN**

Note: Please make sure all documents submitted to DMS are organized according to the checklist

Example of an Organized Lease Submittal Packet



Michele Stevens & Tia Miller
DMS Bureau of Leasing

Example of an Unorganized Lease Submittal Packet



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DMS Bureau of Leasing

Final Approval Process

- **Executed Lease Documents**
- **Executed Disclosure Statement**
- **Energy Performance Analysis Due to DMS Prior to Occupancy
(Required for leases 2,001 sf or greater)**
- **Submit Fire Marshal Report to DMS prior to Occupancy**
- **Executed Tenant Broker Commission Agreement (Fm-4097)**
- **Tenant Broker Evaluation Worksheet**

Announcements



Michele Stevens & Tia Miller
DMS Bureau of Leasing

Questions



Meeting Adjourned

