



**HEADQUARTERS AIR FORCE CENTER  
FOR ENVIRONMENTAL EXCELLENCE**

**PROJECT MANAGEMENT PLAN (PMP)**

**FOR PRIVATIZATION OF  
MILITARY FAMILY HOUSING**

**Wright-Patterson AFB, Ohio**

**7 February 2001**

# **PMP**

## **“SIGNATURE PAGE”**

The Housing Privatization Project at Wright-Patterson AFB, Ohio, represents a concentrated effort by multiple organizations to provide complete and usable military housing units and common-use facilities within the guidelines of the Military Housing Privatization Initiative (MHPI). The successful accomplishment of this endeavor requires a continuing cooperative effort among all participants. Each agency will focus their effort and influence to meet the objectives of selecting a developer who will design, finance, demolish, renovate, construct, operate, and maintain these housing community facilities. This management plan represents the operating procedures that outline the framework of cooperation needed to complete this project.

Larry O’Grady, 28 Feb 2001  
WPAFB Project Manager, date

Drew Titone, 28 Feb 2001  
AFMC Project Manager, date

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AFCEE Project Manager, date

**Wright-Patterson AFB, Ohio**

# TABLE OF CONTENTS

<b><u>SECTION</u></b>	<b><u>PAGE NO.</u></b>
<b>1. INTRODUCTION</b>	<b>1</b>
<b>2. ORGANIZATIONAL ROLES AND RESPONSIBILITIES</b>	<b>1</b>
<b>3. PROJECT IDENTIFICATION (PHASE I)</b>	<b>5</b>
<b>4. RFP AND CONCEPT APPROVAL (PHASE II)</b>	<b>5</b>
<b>5. DEVELOPER SELECTION PROCESS (PHASE IIIA)</b>	<b>6</b>
<b>6. TRANSACTION CLOSING (PHASE IIIB)</b>	<b>8</b>
<b>7. PROJECT MANAGEMENT AND CLOSEOUT (PHASE IV AND PHASE V)</b>	<b>8</b>

## **APPENDICES**

**A. AST ROSTER**

**B. PROJECT SCHEDULE (MICROSOFT PROJECT FILE)**

**C. WPAFB STATEMENT OF OBJECTIVES (SOO) FOR PSC SERVICES**

## **1.0 INTRODUCTION**

The Wright-Patterson AFB (WPAFB) Housing Privatization project was conceived and validated under a partnership between Headquarters Air Force Materiel Command (HQ/AFMC), the Aeronautical Systems Center Commander (ASC/CC), and 88th Air Base Wing Civil Engineer (88ABW/CE). The housing privatization concept for WPAFB is presented in the installation Family Housing Master Plan (FHMP) dated August 1999. Aeronautical Systems Center (ASC), as the lead partner, has requested through HQ/AFMC, the services of Headquarters Air Force Center for Environmental Excellence, Design and Construction Directorate, Housing Privatization Division (HQ AFCEE/DCP) to perform as the Service Agent and the executor of the transaction for this initiative and to join this partnership.

This Project Management Plan (PMP) serves to establish the working relationships required to privatize desired military family housing at WPAFB. A Privatization Support Contractor (PSC) will represent and assist the Air Force in this process. AFCEE has an Indefinite Delivery, Indefinite Quantity (IDIQ) contract in-place with five separate PSCs available. AFCEE will select one of the PSCs through a competitive process for this project. For the purpose of this PMP, the final product of this privatization effort will be the closing of a real estate transaction.

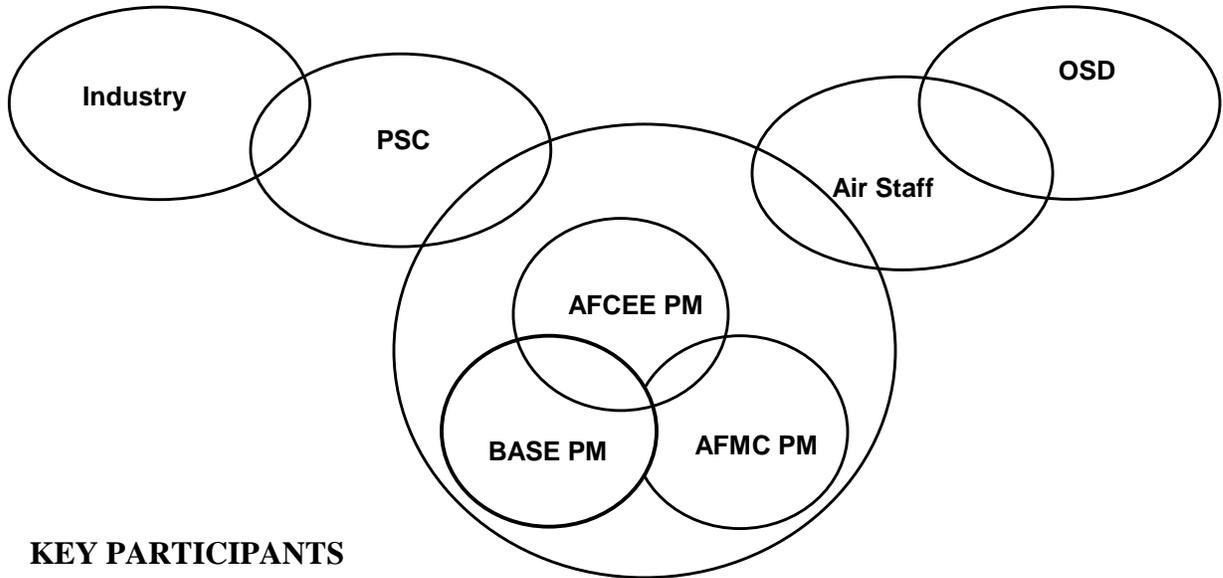
This PMP is organized differently from other Air Force PMPs because of the role of the PSC and because of the changes in responsibilities as the project moves from one phase to the next. It begins by providing a brief overview of the roles and responsibilities of each organization involved in the process (section 2.0). Sections 3.0 and 4.0 deal with Project Identification, development of the Request for Proposal (RFP) package, and Concept Approval (Phases I & II), and are basically complete for this project. Sections 5.0 through 7.0 detail the responsibilities of each party during each phase of this project. The Appendices to this PMP provide primary and secondary points of contact for the Acquisition Support Team (AST), a preliminary project schedule, and the WPAFB version of the intended Statement of Objectives (SOO) for the PSC.

## **2.0 ORGANIZATIONAL ROLES AND RESPONSIBILITIES**

### **2.1 LINES OF COMMUNICATION**

Exhibit 2.1, Lines of Communication, shows the key participants involved with the Air Force Privatization Projects and the formal lines of communication between the Air Force and private sector organizations.

**Exhibit 2.1 Lines of Communication**



**2.2 KEY PARTICIPANTS**

Exhibit 2.2, Key Participants, summarizes the roles of various key participants in the housing privatization project.

**Exhibit 2.2 Key Participants**

PARTICIPANT	ROLE
<b>AFMC</b>	<ul style="list-style-type: none"> <li>• Obtain Air Force approvals</li> <li>• Ensure funding of project</li> <li>• Ensure best value housing</li> <li>• Participate as a member of the AST</li> </ul>
<b>BPM</b>	<ul style="list-style-type: none"> <li>• Identify project requirements</li> <li>• Assist in project planning and development</li> <li>• Oversee privatized housing to ensure it meets requirements</li> <li>• Co Lead the AST</li> <li>• Lead the Management Review Committee (MRC)</li> </ul>
<b>AFCEE</b>	<ul style="list-style-type: none"> <li>• Manage project development</li> <li>• Co Lead the AST; advise the MRC</li> <li>• Award and execute PSC contract</li> </ul>
<b>PSC</b>	<ul style="list-style-type: none"> <li>• Assess proposals and privatization transaction</li> <li>• Support as necessary project award and closing of the transaction</li> <li>• Serve as a consultant to the AST</li> </ul>

## 2.3 AIR FORCE CENTER FOR ENVIRONMENTAL EXCELLENCE

2.3.1 HQ AFCEE is a Field Operating Agency (FOA) of The Civil Engineer of the Air Force (AF/ILE). AFCEE is located at Brooks AFB, Texas. The table below summarizes the services that AFCEE, as the Service Agent and executor of the transaction, will provide during the refinement of WPAFB's existing RFP. During this initiative, AFCEE will participate in all program decisions and workshops and assist in resolving any disagreements between the partnership members. Through its PSC consultant, AFCEE will be responsible for the RFP coordination, revision and approval, proposal evaluation, and lease/contract closing. As such, AFCEE will be the office of primary responsibility (OPR) for ensuring all RFP documents are current, revised, and coordinated throughout the process. AFCEE will maintain the original "masters" of all documents and provide the most current version to the Base Project Manager (BPM). AFCEE will forward the documents officially to HQ AFMC and HQ USAF (Air Staff) upon integration of all review comments.

2.3.2 Exhibit 2.3, Services Provided by AFCEE, shows the major services provided by AFCEE during each project phase:

**Exhibit 2.3 Services Provided by AFCEE**

PRIVATIZATION PHASE	SERVICES PROVIDED BY AFCEE
<b>Phase I</b> <b>Project Identification</b>	<b>*** Task Complete ***</b>
<b>Phase II</b> <b>Project Definition</b>	<ul style="list-style-type: none"> <li>• Coordinate Air Staff comments if any</li> <li>• Award and Execute a contract with PSC</li> <li>• Coordinate PSC comments on Draft RFP review</li> </ul>
<b>Phase III</b> <b>Project Acquisition</b>	<ul style="list-style-type: none"> <li>• Facilitate Initial Meeting at WPAFB with the PSC</li> <li>• Approve the final RFP</li> <li>• Compile Technical Reports/Studies</li> <li>• Monitor Solicitation Process</li> <li>• Make needed public and regulatory announcement</li> <li>• Co Lead the AST with the BPM</li> </ul>
<b>Phase IV</b> <b>Project Management</b>	<ul style="list-style-type: none"> <li>• Advise MRC</li> <li>• Develop New Project Management Plan</li> <li>• Provide Project Oversight/Ensure Compliance</li> <li>• Provide Consultant support (e.g., Title II/SETA)</li> <li>• Conduct Lessons Learned Workshops</li> <li>• Manage Air Force Portfolio Management Properties</li> </ul>
<b>Phase V</b> <b>Project Close-Out</b>	<ul style="list-style-type: none"> <li>• To be determined</li> </ul>

## **2.4 HQ Air Force Materiel Command (HQ AFMC)**

HQ AFMC will participate in all program decisions. HQ AFMC has primary responsibility in serving as the liaison between AFCEE and Air Staff, and in presenting all higher level briefings. HQ AFMC is responsible for gaining higher headquarters approvals, obtaining authorities to advertise and award, determining the initial schedule to be reported to Air Staff for follow-on reporting to Congress, and reporting schedule progress. HQ AFMC will also participate in review of PSC assessments and provide personnel as required to be members of the AST.

## **2.5 ASC/CVH**

2.5.1 Base Project Manager (BPM). HQ AFMC and HQ Aeronautical Systems Center (ASC) have formed a joint integrated team (ASC/CVH) under ASC/CC and will retain lead role in this privatization effort. The ASC/CC has designated the joint integrated team, hereafter known as the BPM, to represent the interests of WPAFB in this partnership and tasked them to fully participate in all program decisions and assist in resolving any disagreements that develop among the partnership members. In addition to co-leading the AST, they will assign functional personnel to serve as members of the AST.

2.5.2 BPM Responsibilities. The BPM completed Phases I & II of this project. The BPM had primary responsibility in identifying and/or establishing all functional and technical requirements, to include items of work, unit types, grade mix, renovation and new construction requirements during the concept and RFP development. The BPM will develop a plan for handling the post-acquisition aspects of this program including: construction quality assurance (if needed), contract or lease administration, any required financial reviews of the developer, housing unit assignments (if needed), landlord-tenant dispute resolution, etc. This plan will be key to the long-term successful operation of the program. The BPM is also responsible for coordinating various aspects of this effort with other base functions and the WPAFB senior leadership. The BPM will coordinate with the Base Financial Management organization to obtain a life cycle cost analysis of the program. This analysis will be updated as required. The base will establish a project management office to support the base's interests and will be supported with AF/ILEI funds, where approved.

The BPM co leads the AST, arranges facilities for and participates in workshops and industry forum/pre-proposal conference/site visits, coordinates base personnel input for workshops, provides local support data (existing utility plans, topographic and geotechnical data, asbestos/lead based paint surveys, local environmental policies, etc.), identifies any phasing requirements, ensures base personnel review deliverables from the standpoint of functionality, and processes review comments.

2.5.3 Base Furnished Materials (Initial Site Orientation Visit). WPAFB will furnish copies of the following documents to the PSC during the firm's initial site orientation visit. These documents represent the components of the RFP Supporting Documents:

- a) Housing Market Analysis
- b) Housing Community Plan and Condition Survey
- c) Family Housing Facility Assessment
- d) Demographic data on current housing residents and waiting list data
- e) Local housing market data (i.e., sizes, availability and rental amounts)
- f) Current BAH rates for all ranks
- g) Base Comprehensive Plans (electronic versions)
- h) Base Housing Areas Site Maps (electronic versions)
- i) Utility rates (both Public and base-owned) and historical utility consumption data
- j) Property tax rates for adjacent communities
- k) Proposed MILCON housing project information
- l) Davis-Bacon wage rate determinations for the local area
- m) Housing occupancy data
- n) Housing waiting list
- o) Environmental Baseline Surveys
- p) Base Utilities Site Maps (electronic versions)
- q) Metes and Bounds site survey data
- r) Information on public schools in the area
- s) Historical Preservation information (if applicable)
- t) Traffic studies
- u) AICUZ (noise) studies

## **2.6 CONTRACTING OF PSC SERVICES**

311 HSW/PKO (Brooks AFB) is the contracting office for all required PSC services.

## **2.7 PSC ROLE**

The PSC role is defined in the SOO found at Appendix C (WPAFB Statement of Objectives for PSC Services).

## **3.0 PROJECT IDENTIFICATION (PHASE I)**

**\*\*\* TASK COMPLETED \*\*\***

## **4.0 RFP AND CONCEPT APPROVAL (PHASE II)**

**\*\*\* TASK COMPLETED \*\*\***

## 5.0 DEVELOPER COMPETITION PROCESS (PHASE IIIA)

The purpose of this phase is to finalize the RFP, obtain final RFP approval, conduct the industry forum, solicit proposals, conduct evaluations, and obtain Air Force approval of a developer. The key project workgroup during this phase is the AST, as described in section 5.1.

### 5.1 ACQUISITION SUPPORT TEAM

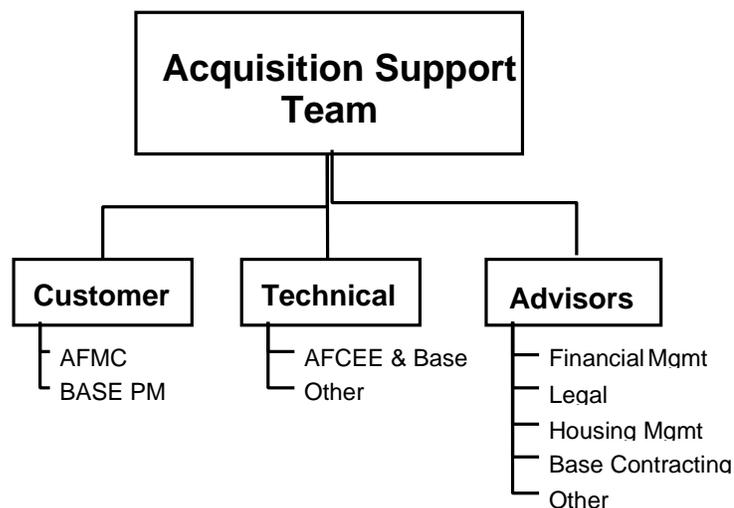
An AST will be established to evaluate proposal assessments submitted by the PSC, and make recommendations to the AFMC/CV. The role of the AST is analogous to that of a source selection evaluation team; however, the AST's evaluation will rely significantly on the assessment performed by the PSC.

AFCEE is tasked with primary responsibility for managing the selection of the housing developer. The AST will be utilized to carefully oversee the work of the PSC and assist in presenting appropriate decision briefings to senior AF leadership. In addition, the AST will be responsible for recommending approval of the PSC's Execution Plan, and for approving and ensuring the final RFP is ready for release and overseeing community forums such as the industry forum or pre-proposal conference.

The AST is co-led by the BPM and AFCEE with full participation of AFMC. Additionally, representatives and technical and other specialized advisors as shown in Appendix A, AST Roster, will participate as required. The PSC is not a member of the AST.

The AST will be organized as shown in Exhibit 5.1.

Exhibit 5.1 AST Composition



## 5.2 RFP DOCUMENT FINALIZATION

The AST, with assistance from the PSC, will incorporate Air Staff and Sec Def review comments. Working with the AST, and with assistance from the PSC, AFCEE may incorporate PSC proposed refinements to the WPAFB's RFP. Document refinements will be based on review comments received from the PSC review of the final draft RFP and approved by the AST. AFCEE will document consensus decisions reached regarding each submitted comment. The RFP documents will incorporate all RFP sections to include scope, solicitation process, proposal instructions, evaluation criteria and basis for award, construction and warranty bonding, and post-award requirements. The RFP will also address the financial, legal and business aspects of the proposed project to satisfy Air Force objectives for housing privatization at WPAFB. This task will also include refinement of the Economic Analysis prepared by WPAFB. The desired outcome of this effort will be a final RFP document ready for issue during the Project Acquisition Phase (Phase III) of the Wright-Patterson Housing Privatization Project per the project schedule in Appendix B.

## 5.3 RESERVED

## 5.4 RESERVED

## 5.5 COMPETITION PROCESS

5.5.1 Delegation of Authority. SAF/MII delegated authority to AFMC/CV to solicit, evaluate, select and negotiate final agreements with an Offeror for final selection with respect to military housing privatization at WPAFB. The Deputy Under Secretary of Defense (DUSD(I)) has retained authority to approve the final lease agreement. Therefore, SAF/MII has retained the authority to approve the selection of an Offeror and to sign the final Lease agreements on behalf of the Air Force.

5.5.2 Competition Methodology. This project will utilize a streamlined, non-FAR (not governed by Federal Acquisition Regulations), "best value" solicitation strategy that encourages maximum flexibility in proposal development. The "best value" determination will be based on an integrated assessment of technical and financial strategy/business plan factors, proposal risk, performance risk and cost to the Government as identified in the Competition Plan.

5.5.3 Execution Plan. Prepared by the PSC, this document details the methodology and personnel the PSC will use in carrying out their solicitation and proposal assessment responsibilities. The Execution Plan will include criteria the PSC will use in assessing proposals and developing their findings. The Execution Plan will be reviewed and approved by the Contracting Officer **upon recommendation of the AST**. (AI -- see Para. 5.1)

5.5.4 Competition Plan. A Competition Plan will be drafted as an attachment to the PSC's Execution Plan. The plan shall conform with the WPAFB RFP, be reviewed by the AST, and approved by AFMC/CV.

## **6.0 CLOSING (PHASE IIIB)**

### **6.1 CONGRESSIONAL NOTIFICATION**

HQ USAF/ILEI will prepare and submit Congressional notification for award and funds transfer package. Transaction closure will not be executed until Congressional notification of intent to award and funds transfer are complete.

### **6.2 PSC TASK**

The PSC will support all tasks to close the transaction in conformance with their proposed Statement of Work (SOW) developed from the government provided SOO.

### **6.3 DEBRIEF UNSUCCESSFUL OFFERORS**

The AST Chief will take the lead in the debriefing of unsuccessful offerors with PSC participation.

## **7.0 RESERVED**

# APPENDICES

**APPENDIX A - AST ROSTER**

	NAME	ORGANIZATON	TITLE	PHONE	E-MAIL
	<b>PRIMARY AST MEMBERS</b>				
*	Mr. Larry O'Grady	ASC/CVH	Base PM	DSN 986-2061	Lawrence.O'grady@wpafb.af.mil
	Mr. Drew Titone	AFMC/CEI	AFMC Project Manager	DSN 986-2947	Drew.Titone@wpafb.af.mil
	Ms. Sallie Wilson	ASC/CVH	Acquisition Business Specialist	DSN: 986-2061	Sallie.Wilson@wpafb.af.mil
*	<b>Mr Al Fraga</b>	<b>AFCEE/DCP</b>	<b>PM-AFCEE Housing Div</b>	<b>DSN 240-8379</b>	
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		AFCEE/DCP	Alternate PM-AFCEE Housing Privatization	DSN 240-	
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\* AST Co-Lead