



# DoDEA ADMINISTRATIVE INSTRUCTION 4245.01

## SCHOOL OUTFITTING PROGRAM

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**Originating Division:** Logistics

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**Approved by:** Thomas M. Brady, Director

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**Purpose:** This Issuance establishes policy, assigns responsibilities, and implements procedures to outfit newly constructed or renovated Department of Defense Education Activity (DoDEA) schools. This Issuance assists DoDEA personnel, in conjunction with, contracting construction agents [i.e., U.S. Army Corps of Engineers (USACE), Naval Facilities Command (NAVFAC), and Air Force Civil Engineer Center (AFCEC)] to make appropriate and cost effective decisions for all required construction and associated equipment and furnishings to ready a school for completion and turnover. The objectives of the school outfitting process are to:

- Develop a comprehensive plan that assists the contracting activity to accurately project requirements and efficiently contract for equipment and furnishing, based on the facilities construction/renovation completion, and turnover schedule.
- Assess the cost effectiveness and applicability of moving existing furnishings and equipment from existing facilities to new school facilities.
- Provide visibility on all steps of the process, including acquisition planning, procurement, contract award, U.S. Government acceptance of equipment and furnishings, and contract closeout.
- Establish awareness of budgeting milestones to promote an effective acquisition plan to execute both school outfitting requirements and non-school outfitting requirements that DoDEA is responsible to procure.

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## SECTION 1: GENERAL ISSUANCE INFORMATION

### 1.1. APPLICABILITY.

a. This Issuance applies to the DoDEA Headquarters Organization, the DoDEA Americas Region, the DoDEA Europe Region, the DoDEA Pacific Region, and to include all schools under the DoDEA authority, and when applicable, volunteers, students, support personnel, student teachers, contractors, and sponsors, parents, and legal guardians.

b. This Issuance applies to DoDEA with respect to its coordination as the requiring activity with facility contracting construction agents (i.e., USACE, NAVFAC, and AFCEC), which are the activities that provide contract management on behalf of DoDEA. This Issuance is intended to be used for both newly completed and renovated schools.

**1.2. POLICY.** It is DoDEA policy that a school outfitting acquisition process be established in order to supply essential equipment and furnishings to newly constructed or renovated DoDEA schools to maintain operational opening dates, to provide oversight during the acquisition of new equipment, furnishings, and the relocation of existing equipment and furnishings. The process shall encompass six (6) phases: Requirements definition, acquisition planning, request for funds, contracting, contract performance, and U.S. Government acceptance.

**1.3. INFORMATION COLLECTION.** This Issuance may result in the collection of information due to its policy and procedures. Any collection of information must follow all applicable Federal, DoD, and DoDEA regulations, policies, and guidance.

## SECTION 2: RESPONSIBILITIES

### 2.1. DODEA DIRECTOR. The DoDEA Director:

- a. Ensures all requirements of the School Outfitting Program contained in this Issuance are completed.
- b. Provides guidance and support to the DoDEA Chief Operating Officer (COO), as required.
- c. Delegates authority to the DoDEA COO or designee to approve memorandums of understanding (MOUs) and memorandums of agreement (MOAs) for school outfitting.

### 2.2. DODEA CHIEF OPERATING OFFICER. The DoDEA COO:

- a. Delegates authority to DoDEA Logistics Division Chief to maintain integrity and accountability of school outfitting funds and assets through compliance with all Federal, DoD, DoDEA, and state, local and country regulations.
- b. Makes final approval of any exceptions to this Issuance.
- c. Approves MOUs and MOAs for school outfitting.

### 2.3. DODEA RESOURCE MANAGEMENT DIVISION CHIEF. The DoDEA Resource Management (RM) Division Chief:

- a. Obligate the funds for School Outfitting Program in accordance with the final school outfitting estimate.
- b. Support planning, developing of requirements, and funding authorization.

### 2.4. DODEA LOGISTICS DIVISION CHIEF. The DoDEA Logistics Division Chief:

- a. Maintains authority delegated by the DODEA to provide School Outfitting Program management and accountability by providing scope, direction, funding, and financial management for the enterprise-wide school outfitting effort.
- b. Provides oversight of planning, developing of requirements, funding authorization, and the development of future requirements.
- c. Ensures all DoDEA personnel are formally advised of their responsibilities in writing by issuing appointment memorandums.

- d. Executes obligated funds.
- e. Reviews MOUs and MOAs for school outfitting.

**2.5. DODEA HEADQUARTERS ASSET MANAGEMENT CHIEF.** The DoDEA Headquarters (HQ) Asset Management Chief:

- a. Develops the order of magnitude cost estimates for Future Years Defense Program (FYDP) budgets based on previous actual school outfitting expenses.
- b. Manages and tracks school outfitting processing efforts in coordination with DoDEA HQ Facilities and DoDEA Logistics Region Outfitters.
- c. Submits the final school outfitting estimate to DoDEA RM Division Chief and ensures that all Fiscal Year (FY) funds are obligated.

**2.6. DODEA REGION LOGISTICS OUTFITTER.** The DoDEA Region Logistics Outfitter (RLO):

- a. Leads the execution of school outfitting projects, through requirements definition, development of detailed cost estimates, funding justification, purchasing, acceptance, and closeout in coordination with DoDEA HQ Asset Management Chief and DoDEA Facilities Division Chief.
- b. Serves as a liaison to the individual representatives from the construction contracting agents to ensure proper lead time for procurement and installation.
- c. Initiates, develops, and oversees Tiger Teams for each project.

**2.7. DODEA DISTRICT LOGISTICS CHIEF.** The DoDEA District Logistics Chief (DLC):

- a. Manages school outfitting contracts, including the costs of drayage and disposal of unneeded assets.
- b. Coordinates with school staff, to include the DoDEA School Principal, Administrative Officer (AO), and Supply Support Assistant (SSA), to determine requirements and assess the usability of existing furniture and equipment.
- c. Coordinates and communicates Furnishings, Fixtures, and Equipment (FF&E) requirements with the school staff in order to:
  - (1) Develop the requirements for FF&E inspection and acceptance.
  - (2) Manage contract closeout responsibilities.

## SECTION 3: SCHOOL OUTFITTING PROGRAM

**3.1. SCHOOL OUTFITTING FUNDS.** This section details equipment and furnishings that can and cannot be purchased with school outfitting funds. School outfitting funds shall only be used for equipment and furnishings required to make the new facility operational.

a. School outfitting funds may be used for the following items only:

- (1) Drayage for existing equipment needed in the new facility.
- (2) Labor for move preparation, execution, unpacking, and acceptance.
- (3) Labor for installation of equipment.
- (4) Classroom and staff collaboration furnishings.
  - (a) Teacher's Sit-to-Stand Desks. Approved for legacy schools only.
  - (b) Teacher's Aide's Chair. Second office chair or 18" student chair.
- (5) SmartTVs. Refer to your regional outfitter for guidance on which rooms are approved for SmartTVs as all areas are not approved.
- (6) Educational materials (i.e., non-consumable supplies) needed to accommodate an overall growth of installation student population approved by HQ, includes the following:
  - (a) Pottery Wheels. Approved for middle and high schools only.
  - (b) Band Equipment only to include:
    1. Music Stands.
    2. Chairs and Mobile Carts.
    3. Director's Stands Podium.
    4. Storage for Music Instruments and Sheet Music.
  - (c) Kilns.
- (7) Kitchen Equipment (Culinary Arts/Main Kitchen) and furnishings.
  - (a) Utility Table and Wheeled Carts.
  - (b) Cookers.
  - (c) Pressure Washer and Reel.

- (d) Dry and cold storage.
  - (e) Food preparation equipment.
  - (f) Miscellaneous: Touch screen monitors (cash registers), lockers, washer/dryers.
- (8) Safety equipment and furnishings.
- (a) Fire extinguishers.
  - (b) Evacuation chairs.
  - (c) Anti-slip mats.
- (9) Material Handling Equipment.
- (a) Pallet Jack.
  - (b) Scissor Lift.
  - (c) Flatbed Carts.
  - (d) Rolling Carts.
  - (e) Hand Trucks.
- b. Items not supported as school outfitting authorized purchases:
- (1) Office Supplies (i.e., paper, pens, scissors, and other consumables).
  - (2) Educational Curriculum (books, sheet music, music instruments/equipment, PE equipment and lab equipment).
  - (3) Individual non-network (desktop) printers.
  - (4) Security Cameras.
  - (5) Kitchen smallware and accessories.
  - (6) Software.
  - (7) Desk Lamps.
  - (8) First Aid Kits.
  - (9) Goggle Sanitizers.
  - (10) Grab and Go Bags.
  - (11) Laminators.



(12) Paper Shredders.

(13) Property tracking technology (global positioning system (GPS) or radio frequency identification (RFID)).

(14) Teacher's Aides Desk. Separate desks for aides are not authorized.

(15) Trash Cans and Recycle Bins.

(16) Weight Room/Gym Equipment.

c. The DoDEA IT Division Chief is responsible for the purchase of IT Infrastructure items and all hardware to include:

(1) Interactive display network connections.

(2) Phone data connections.

(3) Phone equipment.

(4) Network printer connections.

(5) Network printers.

(6) Wireless access points/connections.

(7) Staff/teacher/student data connections.

(8) White boards not funded through the military construction (MILCON) appropriations process.

(9) Interactive Flat Panel (IFP).

(10) Multi-Functional Devices.

d. Requests for exceptions to policy will be submitted to the DoDEA HQ Asset Management Chief and final approval will be made by the DoDEA COO.

**3.2. SPECIAL SYSTEMS AND EQUIPMENT.** Certain school outfitting systems and equipment requires special attention in purchasing, installing, and connecting to the DoDEA enterprise. The requirements, funding, and purchase responsibility for these items are determined by the various DoDEA Divisions.

**3.3. MISCELLANEOUS ITEMS.** Additional items that do not fall under any other school outfitting category are placed under miscellaneous items. These items will be procured by the DoDEA HQ Logistics or the applicable selected Region Headquarters.

## SECTION 4: SCHOOL OUTFITTING BUDGET PROCEDURES

### 4.1. BUDGET SUBMITTAL SCHEDULE.

a. Adhering to the budget schedule is vital to ensure funding is in place for the school outfitting of a new or renovated school. The budget schedule needs to include time for thorough review, feedback, and revisions. Incomplete packages create the risk of a school not receiving adequate funding for its school outfitting requirements. Funding Request Package submittal requirements are detailed in Section 4.6. of this Issuance. The budgeting schedule is based on the FY of the planned school opening.

b. Budgeting activities occur during all phases of the school outfitting process, from requirements definition and acquisition planning, through contract closeout. The planning phases are described in detail in Section 4.4. of this Issuance. Initial budget planning should occur between two (2) to four (4) years prior to the school opening FY. For example, if the school is opening in FY 2022, then planning should begin as early as FY 2018, but no later than FY 2020. Requirements definition and funds request preparation should occur in the FY prior to school opening. For example, if the school is planned for an FY 2022 opening, then these activities occur in FY 2021. During the opening FY, contract award(s), inspection and acceptance, and closeout should occur. A summary of the budget timeline is displayed in Table 1: Budget Timeline of this Issuance.

**Table 1: Budget Timeline**

<b>Planning FY 4 to FY 2 years prior to opening FY</b>	<b>Requirements and Funds Request Preparation Opening FY -1</b>	<b>Purchasing, Acceptance, and Close-out Opening FY</b>
<b>November</b> - HQ Logistics validates school opening dates. DoDEA RLO validates projected order dates.	<b>November 1</b> - Detailed school outfitting estimates are due from the DoDEA RLO to HQ Logistics.	As funds are released, HQ Logistics will release funds to the DoDEA RLO based on the priority list.
<b>February</b> - HQ Logistics submits listing of projects, estimated costs to DoDEA RM Division Chief for FYDP cycle.	<b>December 15</b> - Comments are due from HQ Logistics back to the DoDEA RLO.	<b>July 30</b> - Target date for HQ Procurement to obligate all school outfitting funds.
	<b>February 1</b> - Final school outfitting packages due to HQ Logistics from the DoDEA RLO.	
	<b>March 15</b> - Budget Submittal from DoDEA Logistics Division Chief to DoDEA RM Division Chief.	
	<b>April/May</b> - HQ Logistics validation and defense of projected costs through The Program Budget Advisory Committee process.	
	<b>August 1</b> - HQ Logistics will prepare the spending priority list based on required order dates for school openings.	

c. Cost estimates may be adjusted annually based on the exchange rate, if applicable, and to accommodate fluctuation due to possible increases of raw material costs (e.g., metal for desks and wire) within a four (4) year period based on world events.

d. With an August opening of a projected new school, orders for school outfitting will be placed during the 2nd and 3rd quarter of the current FY, up to 180 days in advance of the proposed opening. In rare cases, schools may open during mid-school year. These rare cases will require extra planning, adjusted timelines, and oversight, as purchases may occur in the previous FY and continue into a new FY. Particular attention must be given to procurement actions to avoid violations of Section 1341 of Title 31, United States Code, also known and referred to in this Issuance as the “Anti-Deficiency Act, as amended.”

e. DoDEA activities not using MILCON funds for renovation can also require school outfitting. Examples of non-MILCON funded renovations include, but are not limited to, individual interior renovations and classroom repurposing. The DoDEA RLO will notify the DoDEA Logistics Division Chief during the facility planning and design of the construction project of funding requirements.

f. The DoDEA RLO will submit a funds request in accordance with Section 4.6. of this Issuance to DoDEA HQ Asset Management Chief for the applicable room(s) subject to the project.

#### **4.2. FUTURE YEARS DEFENSE PROGRAM PLANNING.**

a. FYDP formulation planning will be led by the DoDEA HQ Asset Management Chief. Based on construction schedules and close consultation with the DoDEA Facilities Division Chief and the DoDEA RLO, a detailed listing of projected school openings with estimated school outfitting costs for the next two (2) FYs should be submitted by February 1st of each FY to the DoDEA RM Division Chief.

b. Based on the construction schedule from the DoDEA Facilities Division Chief, the DoDEA Logistics Division Chief will prepare the FYDP submittal by November 30th of each FY. The DoDEA Logistics Division Chief will distribute the draft FYDP package to the DoDEA RLO for validation. The DoDEA RLO will have until December 31, or the last business day of the calendar year, to validate the submission.

#### **4.3. BUDGET YEAR SCHEDULE.**

a. By November 1, two (2) FYs preceding the execution FY, a detailed school outfitting package will be submitted by the DoDEA RLO to the DoDEA HQ Asset Management Chief. For example, if the projected school opening date is August of 2021 (FY 21), the detailed estimate would be due by November 1, 2019 (FY19). Following the submission of the school outfitting package, the DoDEA Logistics Division Chief will have 60 calendar days to review. Comments will be returned by December 15, 2019 (FY19). The final/revised estimate package would be due to the DoDEA Logistics Division Chief by February 1, 2020 (FY20) and should

include updates on changing enrollment data or previous comments. A final review will take place and the DoDEA Logistics Division Chief will coordinate any changes with the DoDEA RLO.

b. The DoDEA HQ Asset Management Chief shall submit the final school outfitting estimate to the DoDEA RM Division Chief by March 15 for inclusion into the next FY budget. Details concerning submittal requirements are provided in accordance with Sections 4.5. and 4.6. of this Issuance.

c. Requests for exception will be submitted to the DoDEA Logistics Division Chief and final approval will be granted by the DoDEA COO.

**4.4. PLANNING.** Planning for school outfitting occurs concurrently with the planning and design for facility construction or renovation. The DoDEA Logistics Division Chief and the DoDEA RLO must work in close coordination with their respective DoDEA HQ and Region Facilities support staff to monitor design and construction schedules. The planning phase of the project is typically four (4) years at a minimum from school opening. Actions during the planning phase are:

a. Developing and revising the school outfitting schedule based on the construction schedule.

(1) At least three (3) years from school opening, the DoDEA RLO will develop the school outfitting schedule, based on the planned construction schedule. As the project schedule evolves, it is inevitable that changes in the outfitting schedule will occur. The DoDEA Facilities staff will coordinate any changes in the construction timeline with the DoDEA RLO and DoDEA DLC.

(2) The outfitting school schedule shall include milestone dates indicating when orders or contracts for equipment and furnishings need to be awarded and performed. These order dates will eventually be prioritized by the DoDEA Logistics Division Chief during the execution year. Priority will be based on the projected order and building occupancy dates (BODs). The DoDEA Logistics Division Chief will fund the entire individual school outfitting request at one time. If there is a delay in receiving funds, or incremental funds are provided to the DoDEA Logistics Division Chief, the portions of the school outfitting request with the earliest BOD will have priority.

b. Survey existing FF&E.

(1) The DoDEA RLO, with the assistance of DoDEA Logistics Division Chief, shall survey existing FF&E to determine what can be transferred and what will be sent to Defense Logistics Agency (DLA) formally known as the Defense Reutilization and Marketing Office (DRMO). The goal is to use, to the maximize extent possible, as much existing FF&E as possible, if such items are of good condition and meet the most current DoDEA education facility specifications. The survey shall be documented by the DoDEA RLO and used to plan for new furniture purchases. See “Appendix 4: Sample Surveys” of this Issuance.

(2) The DoDEA DLC will also research and perform a cost/benefit analysis of drayage costs. There are circumstances in which it is more economical to purchase new FF&E than to incur costs for disassembly, transport, and reassembly of used furniture and equipment. In some circumstances, temporary storage of furniture and equipment will be required.

(3) During this phase, the DoDEA DLC needs local cost estimates for the move process for each piece and/or room of equipment or furniture type and the disassembly and reassembly process for that type of equipment or furniture. That data will inform the final decision made by the DoDEA Logistics Division Chief to purchase or to reutilize existing equipment and furniture. The initial requirement of drayage should be at thirty-five percent (35%) design (i.e., three (3) years prior to school opening). It should be refined eighteen (18) months prior to the need and budgeted one (1) year prior to the need.

c. Determining the execution lead for school outfitting project. The DoDEA Logistics Division Chief will be responsible in determining whether DoDEA or the Military Service Construction Agent (MSCA) will have responsibility for purchasing and installing FF&E at the new school facility. Making the decision early in the planning process allows the lead agent to ensure sufficient contracting capacity is available to conduct the procurement. The DoDEA Logistics Division Chief may choose to retain procurement responsibility while retaining another agency to assist due to capacity or timing issues.

#### **4.5. DEFINE REQUIREMENTS.**

a. No less than two (2) years prior to the school opening, the DoDEA RLO shall define outfitting requirements based on the following:

- (1) Projected enrollment by grade, factored into the sizes and numbers of:
  - (a) Classroom studios (e.g., math, science, PE, art, and music).
  - (b) Special education services.
  - (c) Supplemental instructional programs and services.
  - (d) Library information centers.
  - (e) Student support programs and services.
  - (f) Food services.
  - (g) General administration and support staff.
- (2) 21st Century additions such as hub spaces and corridors which function as “learning streets.”
- (3) Curriculum materials for increases in student enrollment or new capability.
- (4) Furnishings and equipment being transferred from other facilities.

b. The purchase requirement should reflect the total furnishings and equipment requirements of the new school, minus the furnishing and equipment that will be relocated to the new school facility. The purchase requirement should also include projected drayage charges.

c. The DoDEA DLC and the DoDEA District Superintendent projects enrollment as part of the new school planning and designing process. These projected enrollment numbers will be utilized for both the facility design process and for the school outfitting planning processes.

d. In all submissions, the planned requirement shall be articulated as the number of units for each piece of furnishing and equipment. These requirement numbers will be part of the funds request process described in accordance with Section 4.6. of this Issuance.

#### **4.6. FUNDS REQUEST.**

a. Development of the funds request should take place concurrently with the requirements definition. The DoDEA RLO will be responsible for developing a comprehensive package that provides details for the furniture and equipment purchase based on the DoDEA Logistics Division Chief approved school outfitting plan submitted for the DoDEA FY budget plan for the proposed school opening (e.g., approved budget submission is March 2020 for a new school opening in August 2021), as noted in Table 1: Budget Timeline of this Issuance. This package will be due to the DoDEA Logistics Division Chief by November 1st of the FY prior to the school opening. For example, if a school is opening in August 2021, the initial funds request is due to the DoDEA Logistics Division Chief on or before the previous November 1st.

b. The funds request shall include the DoDEA Form 1320, “Approval for in School Organization Change,” in accordance with Section 4.11. of this Issuance.

c. The funds request package must be clear and accurate, and, at a minimum, address the following:

(1) General Information:

- (a) Projected enrollment (by grade and learning type).
- (b) Number of studios (by type).
- (c) Number of learning hubs spaces.
- (d) Number of staff collaboration rooms.
- (e) Number of group learning spaces.
- (f) Number of one-on-one learning spaces.
- (g) Number of learning impaired or special education spaces.
- (h) Academic support spaces.

- (i) Types of exploratory learning spaces.
    - 1. Art.
    - 2. Career and technical education.
    - 3. Junior Reserve Officers' Training Corps (JROTC).
  - (j) Computing centers.
  - (k) Practice rooms.
  - (l) Music.
  - (m) Occupational therapy/physical therapy.
  - (n) Science lab.
- (2) Types of Common Shared Spaces:
- (a) Commons (student and faculty).
  - (b) Food service.
  - (c) Gymnasium.
  - (d) Information center.
  - (e) Multi-purpose space.
  - (f) Performance space.
  - (g) Recycling center.
  - (h) Storage.
- (3) Types of Student Support Spaces:
- (a) Administration.
  - (b) Guidance counseling center.
  - (c) Health suite.
  - (d) Miscellaneous support spaces.
  - (e) Special education office.
  - (f) Detention.

(4) Outdoor Spaces:

- (a) Athletic fields.
- (b) Outdoor learning.
- (c) Outdoor play areas.
- (d) Parking lots.

(5) Building Services:

- (a) Janitorial workroom and work bench.
- (b) Rider floor scrubber.
- (c) Heavy duty storage.
- (d) Maintenance support.
- (e) Supply storage areas.
- (f) Technology service center.
- (g) Transportation support.

d. Requesting school outfitting.

(1) For each room type (listed above) the following must be provided:

- (a) FF&E type.
- (b) Quantity of FF&E.
- (c) Unit cost of FF&E.
- (d) Installation cost of FF&E.

(e) Justification: A short statement why the need cannot be met by utilizing existing furniture for this purpose in the new facility. The justification can be generalized to apply for several different items. A survey of existing furnishing and equipment can be attached.

- (f) Total estimated cost = Quantity X Unit cost + Installation cost.

(2) Basis for cost estimate: Description of how the unit costs have been calculated (i.e., industry quote, historical data, etc.)

(3) For each piece of FF&E, projected purchase data must be outlined. This will be the basis for the DoDEA Logistics Division Chief funding priority list.



(4) School outfitting funds only can be used for curriculum materials when either the new school enrollment exceeds the old school in which case curriculum materials can be purchased to fund the growth in student enrollment, or when a curriculum feature is added that is an increase in capability over the prior school. For example, if the previous school did not have a band room, and the new school does, then school outfitting funds can be used to purchase instruments and educational equipment (e.g., music stands and headphones).

(5) Schools that do not have contract cleaners must ensure procurement of janitorial services to include items such as paper towels, toilet paper, etc.

(6) The DoDEA RLO shall provide a statement regarding required specifications and shelf life for any newly required equipment and furnishings. The goal is to make the best value purchase, and account for life cycle costs in determining the best use of appropriated funds.

e. Drayage. DoDEA expects to reuse as much FF&E that meet facilities specifications as is feasible. As noted above, there are circumstances in which it is more economically feasible to purchase new rather than moving existing items. The DoDEA RLO needs to document these situations as part of the requirements definition process.

#### **4.7. PURCHASING.**

a. The DoDEA RLO is responsible for the coordination of furnishing, equipment, smart technology, and curriculum procurements. All purchases must follow all financial guidance of the DoDEA RM Division Chief. Based on the required order and delivery dates, funds will be dispersed from the DoDEA Logistics Division Chief to the MSCA for the purchases.

b. The DoDEA RLO will be required to submit data on equipment and furnishings costs to the DoDEA Logistics Division Chief by November 30, the FY following the start of the project. The DoDEA Logistics Division Chief will use this data to develop price factors for future estimates. Items or equipment that require modification (non-standard) or changes must be approved by the functional area subject matter expert (SME) for that District. The DoDEA RLO must verify the request and recommendations and final actions will be presented to the Tiger Team members to ensure no other options are available. Approval will be provided via email.

c. The DoDEA RLO will serve as the contracting construction agencies' Contracting Officer's Technical Representative (COTR) for procurements of new equipment and furnishings. The DoDEA DLC and/or the respective SME will serve as the COTR on contracts for moving existing equipment and furnishings. Responsibilities include:

(1) Coordination with the construction contracting agent (i.e., USACE, NAVFAC, and AFCEC).

(2) Preparation of the Independent Government Cost Estimate (IGCE).

(3) Development of the Scope of Work (SOW) and the Performance Work Statement (PWS).

- (4) Assisting with evaluation of contractor proposals.
- (5) Performance monitoring during contract performance.
- (6) Contract closeout, including evaluations and lessons learned.

d. If an MSCA is used to purchase and outfit the school facility, the DoDEA Logistics Division Chief may consider providing seed funds to initiate the purchase process.

e. Seed funds are typically small amounts of money that allow the construction contracting agency to begin developing a solicitation package in the FY prior to the year that equipment and furniture must be installed. This gives the MSCA additional time in the procurement process without violating the “Anti-Deficiency Act, as amended” or the bona fide need rule. The bulk of school outfitting funds can then be dispersed early in the new FY even if delivery is not projected until the following summer.

#### **4.8. ACCEPTANCE.**

a. The DoDEA RLO shall lead the inspection and acceptance process of equipment, materials, and FF&E. Acceptance should only be authorized after ensuring delivery of contract compliant materials and equipment that operates properly and was not damaged during the move and installation.

b. The installation punch list documenting the received item, quantities, and the condition shall be kept on file at the DoDEA DLC and DoDEA RLO offices. An example punch list can be found on the DoDEA Logistics Asset Management Cloud site.

#### **4.9. CLOSEOUT AND FEEDBACK.**

a. The last step of the school outfitting process is the final contract closeout. The DoDEA DLC and DoDEA RLO will ensure documents pertaining to school outfitting are maintained for warranty and accountability based on applicable guidance from the DoDEA Manual 4100.2. At a minimum, data concerning the funds request and any purchasing and acceptance forms are to be retained. See Table 2: Contract Closeout Responsibilities of this Issuance for a list of all stakeholders that own a separate process outside of the DoDEA Logistics Division Chief for closing out school outfitting contracts.

**Table 2: Contract Closeout**

	<b>HQ</b>	<b>Region</b>	<b>District</b>
<b>Education HQ SME</b>	Requirements; Policy; Inter-Divisional Coordination; SME guidance; Coordination of Education Specifications	Not Applicable (N/A)	N/A
<b>Facilities</b>	Program Policy, Standardization/Education Specifications, contracting construction agent interface, Budgeting. MILCON; disposition of closed facilities	Project/Portfolio Management, Real Estate point of contact (POC), Represent DoDEA users, Lead Design Reviews and Charrettes; Punch List	No MILCON decision authority; Operational side; Warranty Program POC; facilities operations specialists input only; update contracts
<b>Human Resources</b>	Human Capital Strategy (New or Replacement School) in coordination with Superintendent and Principal	Submit Standard Form 52, "Request for Personnel Action," to move personnel	N/A
<b>IT</b>	Program, Policy, and Budget Chief Information Officer; Compliance (Cyber)	Tactical; Implementation Chief Technology Officer	Surveys, Installations
<b>Logistics</b>	Program, Policy and Budget; Gather school outfitting requirements; Review requirements; Budget, re-use; Inspections; Share address updates	FF&E Coordination, Validation, and Monitoring; contracting construction agent school outfitting coordination; Lead integrated product team; DoDEA Logistics Division Chief validates disposition of property prior to demolition	Execution (make it happen); MOU and MOA; Drayage planning; Transportation
<b>Procurement</b>	Large Contracts (FF&E not USACE), IT, Drayage blanket purchase agreement; Update addresses (Asset Management Branch)	Orders on contracts (need more specificity); update contracts	Orders on drayage (need more specificity); update contracts
<b>Resource Management</b>	Projections; Policy (in coordination with Operations, Plans, Legislation, and Policy Division (OPLP); Purchase Request (PR); Organization Codes loaded; Defense Agencies Initiative	Manpower Requirements to HQ; Provide enrollment data to HQ; Local National funding	PR; Coordinate utilities; Military Interdepartmental Purchase Requests (MIPR); government-wide commercial purchase cards (GCPC)
<b>Safety</b>	Policy, Requirements, Budgeting for Program	N/A	Review design; participate in pre-final and final inspections
<b>Security</b>	Program Oversight; Policy; Budget	N/A	Local coordination
<b>Superintendent/ District and Community</b>	N/A	N/A	Coordinating and Communicating delayed openings; Instructional Support Specialist Reach back; Validation of Requirements; On the ground support to military installation

b. The DoDEA Logistics Division Chief will generate feedback based on lessons learned on the project. This closeout survey should contain an evaluation of the purchasing contractor, movers, and any lessons learned. This will be completed with the precise pricing and forwarded

to the DoDEA Logistics Division Chief no later than November 30 of the FY following the school opening.

#### **4.10. SCHOOL CLOSURE PROCESS.**

a. As part of the overall school outfitting process, the DoDEA DLC is responsible for ensuring that the DoDEA school facilities are closed in accordance with DoDEA Manual 4100.2, DoD Instruction 5000.64, and DoDEA Administrative Instruction 1320.01.

b. Preparation for a school closing occurs throughout the construction and school outfitting process. School closing, as with school outfitting, is a requirement which needs to be planned for and executed according to the plan.

c. The key milestones of school closures include:

- (1) Determination of school facility disposition.
- (2) Planning for equipment reutilization and disposition.

**4.11. EQUIPMENT REUTILIZATION AND DISPOSITION.** The DoDEA DLC and the DoDEA RLO will be responsible for planning reutilization and disposition activities related to school closures. Planning for school closures should occur concurrent with school outfitting planning and involves many of the same requirements contained in this Issuance. Activities for planning include:

a. Assessment of FF&E and Materials. In accordance with DoDEA Manual 4100.2 and depending on the final facility disposition, the DoDEA DLC and the DoDEA RLO will assess all FF&E and materials to determine if these items will:

- (1) Go to the new school facility.
- (2) Transition to another DoDEA school within the district.
- (3) Transition to the DLA Defense Reutilization and Marketing Service for disposal or reuse with other organizations.
- (4) Stay in the existing school facility if the plan is to re-use the facility. In this instance, coordination with the future user will be required. The future user will have to articulate their requirements to the DoDEA DLC in writing.

b. In accordance with DoDEA Administrative Instruction 1320.01, the DoDEA DLC shall prepare the DoDEA Form 1320, "Approval for School Organizational Change" via the automated 1320 application, requesting a school organization change to close the school. The DoDEA Form 1320, "Approval for School Organizational Change" will be submitted to the DoDEA Logistics Division Chief and approved by the DoDEA Director. This request is required prior to or with the original budget submission by November 15th of Year 2 planning.

c. Arrange for Equipment and Contract Services. Depending on the disposition of the facility (demolition, transfer, etc.), the DoDEA District Facilities Chief is responsible for ensuring the facility is turned over pursuant to the standards agreed upon as part of the MILCON planning process. The DoDEA DLC will arrange for the cleaning and removal of all materials, FF&E to adhere to the agreed upon final condition of the facility. See Table 3: Reutilization and Disposition Responsibilities of this Issuance for the reutilization and disposition responsibilities.

**Table 3: Reutilization and Disposition Responsibilities**

<b>Equipment Disposition</b>	<b>Property Preparation</b>	<b>Coordination</b>	<b>Responsibility</b>
Demolition of Facility	Complete removal of all FF&E and materials.	DoDEA MILCON Program Manager (PM)	DoDEA DLC
Transfer to Military Installation	Develop agreed upon removal of FF&E and materials. Ensure utility responsibility is turned over to the Military Installation or new tenant.	Military Installation support staff, DoDEA DLC, or new tenant	DoDEA DLC DoDEA MILCON PM
Transfer to Other DoDEA Activities	Develop agreed upon removal of FF&E and materials.	Coordination with DoDEA users.	DoDEA DLC

**4.12. FURNITURE, FIXTURES, AND EQUIPMENT REUTILIZATION.**

a. Furniture reuse is a District level effort. The DoDEA DLC will coordinate with the DoDEA District Superintendent and other stakeholders to establish furnishing baseline requirements. The DoDEA RLO and the DoDEA DLC will assess current FF&E, materials, and supplies for reuse. The DoDEA RLO will prepare and submit a detailed furniture package, to include a Furniture Evaluation Survey (use template at the DoDEA Cloud Asset Management Site), with any other relevant information to the DoDEA Logistics Division Chief for budget approval. The process will also be used to submit furniture lifecycle replacement requirements for existing schools.

b. This process will identify what items will be provided by the building contractor as part of the MILCON and the who, what, when, and where of the furniture process (who is responsible, what are the items to be furnished, when must requirements be submitted for the school to open on time and what are reusable the items from the old school).

c. Commencing eighteen (18) months from the school opening, the DoDEA RLO will conduct meetings to provide a furnishings checklist, develop a specific prioritized plan for each school, assess current furniture for reuse, and submit requirements. This process will assess the furniture serviceability, usefulness, and the lifecycle replacement of the existing furniture. Furniture Assessment Phases include:

(1) Phase 1: Baseline Evaluation.

(a) The Furniture Condition Assessment Reports (FCAR) are reports produced by the DoDEA RLO. The FCAR captures data that provides the condition of the furniture in DoDEA schools. Data in the FCAR can serve as the baseline criteria to establish the reuse of furniture for newly constructed, renovated, and lifecycle replacement schools. The following FCAR evaluation criteria will be used by the DoDEA RLO, DoDEA DLC, and the DoDEA School Principal during the initial physical walkthrough. The evaluation criteria are:

1. Level 1: Condition (wear, damage, vandalism).
2. Level 2: Appropriateness (functionality and adequate for the space in which it will be used).
3. Level 3: Harmonious style assuming the FF&E is to be located within the new facility or repurposed within the existing facility (e.g., compatibility of styles, similar colors, and 21st century adaptable).

(b) The FCAR evaluation standard rating scale is:

1. Rating denotes furniture in poor condition; one to three (1-3) years of service life remaining.
2. Rating denotes furniture that is showing significant signs of aging to include minor damage; three to five (3-5) years of service life remaining.
3. Rating denotes furniture that shows signs of fair wear and tear but is not damaged or vandalized; five to ten (5-10) years of service life remaining.

(2) Phase 2: Lifecycle Furniture Plan.

(a) The DoDEA RLO will develop a furniture evaluation plan for the school and administrative offices and use the data captured in Phase 1 to report the current condition of the furniture.

(b) The intent of the plan is to provide a consistent definition and audit trail of the evaluation of the furniture replacement process.

(c) The complete lifecycle furniture plan should be reviewed by the DoDEA DLC and school principal for all newly constructed, existing, or renovated schools. The plan should include the following:

1. Pictures of existing furniture along with a narrative describing the condition/impairments of the furniture. If items are in good condition and comply with DoDEA education facility specifications, the goal is to maximize the reuse of as much furnishing and equipment as possible.

2. Survey of existing furnishings and durable items to determine what can be reused and what will be disposed. The survey shall be used to document and plan for new furniture purchases.

(3) Phase 3: Analyze and Research Drayage Costs.

(a) The DoDEA DLC must determine drayage and moving costs for the disassembly and reassembly of the furniture using the standard of scale for their local area. The data is required to justify a new purchase or reutilization of old assets. Reuse criteria for furniture is a Level 3 in the FCAR evaluation scale, indicating five to ten (5-10) years of remaining service life. Common furnishings often reused include:

1. Trash cans, recycling bins, and wastebaskets.
2. Food service trash cans (sanitary conditions must be considered).
3. Hazardous Materials (HAZMAT) cabinets.
4. Worktables.
5. Vertical file cabinets and flat file cabinets.
6. Drying racks.
7. Flip form risers.
8. Guest chairs, folding chair carts, folding chairs, and folding tables.
9. Gym equipment.
10. Musical instruments and music stands.
11. Maps and globes.
12. Office equipment (e.g., calculators, pencil sharpeners, and fans).
13. Bookcases.
14. Classroom rugs (e.g., estimate cost for cleaning).
15. First Aid kits.

(b) Lifecycle replacement should be considered for furnishing with less than three (3) years of remaining service life. Possible justifications for lifecycle replacement are:

1. Mismatched desks and student tables.
2. Different styles of rectangular desks.

3. Tables with fixed height legs, not flexible or adjustable.
4. Rooms with two to four (2-4) styles of tables showing signs of wear and missing parts.
5. Upholstered/fabric style chairs are old, stained, and/or worn.
6. Insufficient quantity.
7. Initial requirements.

(c) Based on the projected student enrollment, number of classrooms, and any required changes to furniture types, the DoDEA RLO and DoDEA DLC shall develop initial estimated quantities for equipment and furnishings. The DoDEA RLO and DoDEA DLC should also have awareness of the new types of required classrooms or spaces that are not in the existing school.

1. Initial Order Preparation.

- a. The DoDEA DLC should refine their IGCE based on historical pricing data and/or available resources such as catalog pricing from vendors. Based on the school location, the DoDEA RLO should begin developing market research on past performance data and lessons learned from previous school outfitting efforts. The DoDEA RLO shall track and document vendor/contractor performance.

- b. The required deliverables during this phase shall be coordinated with the DoDEA RM Division Chief through Program Objective Memorandum (POM)/FYDP submissions.

2. Coordination with the District. The DoDEA DLC shall initiate coordination and communications with the school. Coordination includes providing construction and school outfitting schedules, move dates, school openings and closures, and eventual packing requirements.



## GLOSSARY

### G.1. ACRONYMS.

AAFES	Army & Air Force Exchange Service
ABA	Americans with Barriers Act
ADA	Americans with Disabilities Act
AFCEC	Air Force Civil Engineer Center
AO	Administrative Officer
AI	access intercom
BOD	building occupancy date
CATV	cable television
CCTV	closed circuit television
COO	Chief Operating Officer
COTR	Contracting Officers Technical Representative
DLA	Defense Logistics Agency
DLC	District Logistics Chief
DRMO	Defense Reutilization and Marketing Office
EDU	Education Division
FCAR	Furniture Condition Assessment Reports
FF&E	furniture, fixtures and equipment
FY	fiscal year
FYDP	Future Years Defense Program
GCPC	Government-wide commercial purchase card
GPS	Global Positioning System
HQ	headquarters
IFP	interactive flat panel
IGCE	independent government cost estimate
IT	Information Technology
JROTC	Junior Reserve Officers' Training Corps
MILCON	military construction
MIPR	Military Interdepartmental Purchase Request
MOA	Memorandum of Agreement
MOU	Memorandum of Understanding
MSCA	Military Service Construction Agent

N/A	non applicable
NAVFAC	Naval Facilities Engineering Command
NEX	Navy Exchange Service
NFPA	National Fire Protection Act
O&M	Operations & Maintenance
OPLP	Operations, Plans, Legislation, and Policy Division
PE	physical education
PM	Program Manager
POC	point of contact
POM	Program Objective Memorandum
PR	purchase request
PWS	performance work statement
RFID	radio frequency identification
RLO	Region Logistics Outfitter
RM	Resource Management Division
SME	subject matter expert
SOW	scope of work
SSA	Supply Support Assistant
UFC	Unified Facilities Criteria
USACE	United States Army Corps of Engineers
VOIP	voice over internet protocol

**G.2. DEFINITIONS.** Unless otherwise noted, these terms and their definitions are for the purpose of this Issuance only.

**bona fide need rule.** A rule of appropriations law mandating that a FY's appropriations only be obligated to meet a legitimate or bona fide need arising in (or sometimes before) the FY which the appropriation was made.

**drayage.** The transport of assets over a short distance in the shipping and logistics industry.

**MILCON.** Any construction, alteration, development, conversion, or extension of any kind carried out with respect to a Military Installation.

**Tiger Team.** A group of stakeholders assembled for the purpose of efficiently outfitting a school from start to finish.

## **REFERENCES**

- DoD Instruction 5000.64, “Accountability and Management of DoD Equipment and Other Accountable Property,” April 27, 2017, as amended
- DoDEA Administrative Instruction 1320.01, “Request for Approval of School Organizational Change,” January 11, 2010
- DoDEA Form 1320, “DoDEA Request for Approval of School Organizational Change,” November 2007
- DoDEA Logistics Asset Management Cloud Site, <https://cloud.dodea.edu/SitePages/home.aspx>
- DoDEA Manual 4100.2, “Material Management Manual,” November 28, 2005, as amended
- Standard Form 52, “Request for Personnel Action,” July 1991
- United States Code, Title 31, Section 1341 (also known as “The Anti-Deficiency Act, as amended”)

## APPENDIX

### APPENDIX 1: INTERNAL CONTROLS EVALUATION CHECKLIST

**F-1. Function.**

The function covered by this evaluation is the School Outfitting Program.

**F-2. Purpose.**

The purpose of this evaluation is to assist users of policies and responsibilities related to school outfitting in evaluating the key internal controls listed. It is not intended to cover all controls.

**F-3. Instructions.**

Have all responsible personnel listed in Section 2 of this Issuance fully read and understand their responsibilities as set forth?

Were all planning phases of the school outfitting program understood?

Are the timelines given in Section 4, for budgeting procedures relatively enforceable? Please provide instances of possible deviations.

Are all requirement definitions and funds requests preparations able to be finalized in the FY prior to school opening?

During the opening FY, contract award(s), inspection and acceptance, and closeout should occur, please provide instances of possible deviations.

Referencing the Table 1: Budget Timeline, are there any activities listed in the table that caused a delay to the overall time? If so, what factors caused the delay?

**APPENDIX 2: DODEA OUTFITTING COST ESTIMATE**

<b>School Template</b>				
<b>Project Name:</b>				
<b>Location:</b>				
<b>Project Number:</b>				
<b>Programmed Amount:</b>				
<b>Area Office:</b>				
<b>Project Manager:</b>				
Equipment associated with this MILCON project which will be provided from other appropriations				
Equipment Nomenclature	Procuring Appropriation	FY Appropriated	Est Cost \$000 Assuming All New	Est Cost \$000 Assuming Reuse
Furnishings	O&M	2015		
Kitchen	O&M	2015		
IT	O&M	2015		
Education Supplies	O&M	2015		
Safety Equipment	O&M	2015		
Security Equipment	O&M	2015		
Markups (20%)				
Drayage Costs (Reuse)				
USACE Outfitting				
OCONUS Factor				
<b>Total</b>			\$	\$
<i>Markups include fees, installation, freight, procurement, escalation and taxes (average 20%)</i>				

**APPENDIX 3: PURCHASING SCHEDULE**

<b>DoDEA Outfitting - Projected Order Dates</b>				
<b>Project Name</b>				
<b>Estimated Opening Date</b>				
<b>Item Name</b>	<b>Order Date</b>	<b>Delivery Date</b>	<b>Assembly Date</b>	<b>Acceptance Date</b>
Major Category - Room type				
Examples				
Studio Furniture				
Staff Collaboration Furniture				
Staff Collaboration Refrigerators				
Administration Furniture				
Kitchen Furniture				
Kitchen Equipment				
IT Connections				
Grab and Go bags				
Fire Extinguishers				
First Aid Kits				

**APPENDIX 4: SAMPLE SURVEYS**

<b>DoDEA Outfitting - Existing Furniture and Equipment Survey</b>					
<b>Project Name</b>					
<b>Estimated Opening Date</b>					
<b>Item Name</b>	<b>Quantity</b>	<b>21st Century Compliant</b>	<b>In Good Condition</b>	<b>Cost Effective to Move</b>	<b>Move to New School</b>
Furniture/equipment type					
Examples					
Classroom chairs - room 207	30	Y	Y	Y	Y
Classroom Chairs - Room 206	30	N	Y	Y	N
Kitchen Ovens	2	Y	Y	N	N
Administration Conference Tables	5	Y	N	N	N

**Instructions:**

Group FF&E by room, type, and condition.

If categories “21 Century,” “In Good Condition,” and “Cost Effective to Move,” – “yes” the FF&E moves to the new school.

<b>DoDEA Furniture Evaluation</b>		<b>School Name</b> _____			
<b>Room Number</b> _____		<b>Type Room</b> _____			
<b>Type Furniture</b>	<b>Condition Code A</b>	<b>Condition Code B</b>	<b>Condition Code C</b>	<b>Condition Code D</b>	<b>Total Number Assigned</b>
Student Desk					
Tables					
Chair (Student)					
Teacher Desk					
Stationary Chairs					
Cafeteria Table					
Music Stands					
Office Furniture					
Cubby					
Bookcase					
Condition Code A Excellent	New or like new in appearance. No marks or damage. Items with no limitations or restrictions. Includes material with an estimated four (4) years of life remaining.				
Condition Code B Good	Items have an acceptable appearance with very minimum marks, discoloration, or adverse appearance. Material that is serviceable and fully suitable for its intended purpose. Items have a minimum of two (2) years of life expectancy remaining.				
Condition Code C Satisfactory	Items which meet only the minimum standard or serviceability. Items have some marks and writing on tabletop but can be cleaned. Minor scrapes to legs. Items with slight discoloration. Noticeable wear and tear. Items with less than one (1) year of life remaining.				
Condition Code D Unsatisfactory	Items with permanent marker writing, chips, carving or any type of graffiti writing. Furniture missing parts, screws, or items that no longer sit level. Cracked furniture items. Any item presenting a safety hazard. Items that no longer function as originally designed.				
<b>Note:</b> When reviewing classroom desks and chairs, consideration must be given to replacing all items if the majority of items are in unsatisfactory condition. This is necessary in order for the classroom to maintain the appearance of uniformity.					



**APPENDIX 5: RE-UTILIZATION ACCEPTANCE CHECKLIST**

This checklist is to be completed by the DoDEA DLC or the DoDEA School Principal and submitted to the DoDEA RLO. All will sign and attest to performing the quality assurance/quality control actions below.

1. Use the guidance provided in this Issuance.
2. Furniture.
  - a. The quantities and furniture types from the purchasing order match the quantities and types received.
  - b. Per the purchase order and SOW, all pieces were assembled properly and tested.
  - c. All received items are in “new” condition. The items were all received on time.
  - d. The items are in the correct locations.
3. Equipment.
  - a. Item types and quantities received match the purchase order.
  - b. All equipment was assembled and is working properly and has been tested. All items are in new condition.
  - c. The items are in the correct locations.
4. IT Connections.
  - a. All connections have been established.
  - b. All connections are in proper working order and have been tested.
5. Safety.
  - a. All safety items have been received.
  - b. All safety items are in proper working order and have been tested.
6. Other.

If any of the above items are not checked, please provide an explanation below.

Outfitting acceptance quality assurance has been performed and the items above are ready for DoDEA HQ review.

TITLE	Printed Name	Phone/Email	Signature
District Logistics Chief			

**APPENDIX 6: TYPICAL OUTFITTING PROJECT TIMELINE**

<b>Typical Outfitting Project Timeline</b>		
<b>Timing</b>	<b>Task</b>	<b>Responsible Party</b>
Opening FY - 4 years	Initiate planning process	RLO and DLC
	Meet with DoDEA Facilities Division Chief to review project details, e.g., projected enrollment, classroom numbers,	RLO and DLC
Opening FY - 3 years	Define requirements	RLO and DLC
	Develop Order of Magnitude Cost Estimate for FYDP	RLO and DLC
	Establish outfitting and move schedule based on school opening	RLO and DLC
	Monitor design process	RLO and DLC
	Survey existing furniture and equipment to determine what will be re-used	RLO and DLC
Opening FY - 2 years	Finalize equipment/furnishing requirement	RLO and DLC
Opening FY - 1 years	Monitor MILCON design/construction schedule, adjust as required	RLO and DLC
	Submit initial funds request package	RLO and DLC
	Review/comment on detailed cost estimate	RLO and DLC
	Submit final outfitting funds request packages	RLO and DLC
	Develop Order priority list	RLO and DoDEA Logistics Division Chief
	Disperse funds per priority	DoDEA Logistics Division Chief
	Execute purchases and contracts	RLO
Opening FY	Execute move and installations	DLC
	Perform acceptance	DLC
	School Opening	DoDEA Logistics Division Chief
	Perform closeout activities	DLC
	Provide actual orders and expenditure	DLC
FY +1	Develop lessons learned, suggestions for improvement to DoDEA HQ	DLC