Project Management Tools Boost Transparency and Engagement

Thursday, June 16th, 2022
Our Agenda

Moderator

Kelly Morrison
Business Systems Specialist
Portfolio Management & Client Engagement Division
New England Region (R1)
GSA-PBS

RWAs and eRETA

Kahua - Project Management Tool

OASIS - Occupancy Agreements

Project Pulse Survey
**Our Speakers**

**Ashlee Carlson & Rachel Bichsel**  
Program Managers - Reimbursable Services  
Center for Customer Delivery  
Office of Design and Construction  
GSA-PBS  
**RWAs and eRETA**

**Andrea Bell**  
National Program Manager  
Customer Intelligence  
Office of Portfolio Management and Customer Engagement  
GSA-PBS  
**Project Pulse Survey**

**Tina Atkins**  
Change Management Lead  
Office of Design and Construction  
GSA-PBS

**Valerie Pierre**  
Training and Support Lead  
Office of Design and Construction  
GSA-PBS  
**Kahua**

**Lisa McCoy & Deann Salazar**  
Program Managers - National Rent Billing Office  
Office of Portfolio Management and Customer Engagement  
GSA-PBS  
**OASIS**
RWAs and eRETA
RWAs and eRETA

**RWA Policy** and Process

- GSA Public Buildings Service (PBS) provides above standard services and projects funded by agency Reimbursable Work Authorizations (RWAs)
- RWAs are subject to appropriations law and RWA National Policy
- PBS accepts and manages requests via eRETA

**eRETA** as a transparency tool

- eRETA = external RWA Entry and Tracking Application
- Electronically submit and modify work requests (WRs) and RWAs
- View up to date financial information and documents
RWA Policy and Process

Keeping things moving, together

- **RWA Fundamentals Training** (Policy and Process) - Thursday 7/21
- RWA National Policy Manual clarifies laws and is updated regularly
- Work Request-RWA process is a collaboration between GSA and the Customer
- Process is facilitated by eRETA

### Work Request-RWA Process

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
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<tbody>
<tr>
<td>Pre-Planning Status</td>
<td>Customer enters and saves WR information</td>
</tr>
<tr>
<td>Unassigned Status</td>
<td>Customer sends WR to GSA&lt;br&gt;☑ Email from eRETA: New WR is submitted to GSA</td>
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**Planning/Estimate Status**

1. GSA assigns PM/POC to project or service<br>☑ Email from eRETA: Work Request # has been assigned
2. GSA PM/POC and Customer develop requirements (Scope, Estimates) and links an estimate in RETA<br>---- This timeframe varies depending on type of project or service ---- <br>☑ Email from eRETA: GSA has approved the estimate for WR #
3. Customer enters remaining information and sends RWA to GSA for acceptance<br>☑ Email from eRETA: WR/RWA Sent to GSA for Acceptance

**GSA may take up to 5 business days to assign a PM**

**Pending-New Status**

- GSA reviews and enters GSA-specific information

**Sig-Requested Status**

- GSA routes for digital signatures

**Accepted Status**

- Customer and GSA digitally sign RWA via DocuSign Email<br>☑ Email from eRETA: Acceptance Letter

**GSA may take 15 business days to review before routing for signatures**
eRETA - Improving RWA Process Since 2016

eRETA has improved the WR/RWA intake process by:

- Increasing data accuracy and availability - instant data validation
- Providing transparency - financial activity and RWA remaining balance viewable in eRETA, updated 4x/day
- Documenting activity - RWA status and documents are available any time
- Speeding up the RWA acceptance process

eRETA Training

- Recordings of training and guides available at www.gsa.gov/ereta
- Live training will be offered again in FY23
Q&A - RWAs and eRETA
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FOCUS FOR THE FUTURE

Kahua - PBS’s New Project Management Tool
Kahua

Learning objectives

- Understand what Kahua will do for project management and collaboration
- Learn who will be using Kahua
- Find out how Kahua can be used by customers
- Discover when Kahua will be available for customers
- Learn how to request and access Kahua
- Know where to go for more information or assistance
Let’s Kahua

Need for change

- Current system (ePM) no longer supported by its vendor
- Opportunity to transition to a better project management tool
  - Spans multiple business lines
  - Captures all project phases
  - Includes different project types
  - Fosters project collaboration
What will Kahua do?

Access:
- Single Interface
- Quicker
- Mobile
- Internal/External

Usability:
- Easy to Use
- Easy to Navigate
- Data Integration
- Embedded Dashboards / Reports

Document Integration:
- EDMS
- CFR
- Google Drive
- BIM Mark Up
- Email

Collaboration:
- RFIs
- Submittals
- Design Review
- Scheduling
- Punchlist
Who will use Kahua?

Internal stakeholders:
- GSA project manager - owned and leased
- Architectural subject matter expert (SME)
- Engineering SME
- Sustainability SME
- Building manager/Property manager
- Lease administration manager
- Contracting officer
- Budget analyst
- Client planning manager
- Asset manager
- Regional manager
- National program manager

External stakeholders:
- Federal customers
- General contractors
- Construction managers
- Architects
- Engineers
- Lessors
- Lease brokers
How will Customers use Kahua?

Via applications:

- Review and comment on documents
- Collaborate with the project team on drawings and design mark ups
- View daily reports, field observations, submittals, punch lists, and RFIs
- View reports
- View and download project details
- Access Kahua on a mobile device
When will Kahua be available for customers?

Phase 1
Select Lead Projects
October 2021 - January 2022

Phase 2
Above Prospectus
(Owned / Leased Acquisition)
January - April 2022

Phase 3
Owned Below Prospectus / Post Occupancy Lease Alterations
April - August 2022

Phase 4
Leased Acquisition Below Prospectus / Delegated Buildings / Customers
July - November 2022

Customer Roll Out
- August 1 - Licensing / Access
- August 18 - Instructor-led Training
- September 15 - Instructor-led Training
What are the steps to access Kahua?

Step 1: Request access from a GSA Project Manager.

Step 2: Finalize your account.
You will receive an email from outbox@kahuafn.com with Subject Line: Kahua Invitation. Follow the instructions to finalize your account.
What are the steps to access Kahua? Con’t

Step 3: Choose how you want to access Kahua.

- **Option 1: Desktop App** (requires Windows 8.1 or higher) - Recommended
  - View video: [Download Kahua App for external users](#) (4:11).
- **Option 2: Web Browser** (requires Chrome, Edge, Firefox or Safari)
  - In your browser, enter the URL: [launch.kahuafn.com](#).
  - Select ‘Launch in Browser.’
- **Option 3: Mobile Device** (requires Government- or Contractor-Issued Device)
  - Open App Store or Google Play Store and search for Kahua.
  - Select ‘kahua mobile Construction Management’ or ‘...Kahua Business.’
  - Select ‘Get’ or ‘Install.’
www.launch.kahuafn.com

Get the Kahua App

Launch in Browser ➔

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Where to go for information and assistance?

1. Online Resources
   - gsa.gov
     - Access and Login Information
     - Training Videos / Reference Guides
   - Embedded Videos within Kahua
     (right click on application in left hand menu)

2. National Support Center
   - Kahua Support & Feedback Form
   - kahuasupport@gsa.gov

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OASIS - OA Tool Replacement
OA Tool Replacement - OASIS

Occupancy Agreement & Space Inventory System (OASIS)

- OASIS will provide Customer Self-Service:
  - View your OAs by AB code
  - Compare OA versions side by side
  - Download your rent data and assignment drawings
  - Provide PBS with headcounts
  - 3 open fields for customer use (e.g. Agency Region #)

- OASIS will become the exclusive location to:
  - Receive OAs
  - Review, Approve, and Return OAs
  - Start the Release of Space clock
OA Tool Replacement - OASIS Key Dates

- Announcement letter sent in January
- Go Live date has changed to April 3, 2023
- In June, expect:
  - Follow-up letter to “officially” update the Go Live date
  - Letter to CFOs asking for agency POCs to discuss the OA Approval process (at least 1 POC per AB code)
- January-February 2023: PBS provides training and resources for customer users
OA Tool Replacement - OASIS Resources

GSA.gov page:  www.gsa.gov/PBSOasis

Contact email:  PBSOasis@gsa.gov

Client Enrichment Series:  http://www.gsa.gov/ces

Held April 5, 2022:  Policy and Process Changes for Occupancy Agreements - An Introduction to OASIS

Next Session:  September 8, 2022 @1pm Eastern
Q&A - OASIS
As an RWA or Lease Project POC, you will receive Project Pulse Surveys.

Surveys are triggered at key milestones in a project’s life cycle.

Questions reflect attributes like Scope, Schedule, Budget, Communications, Quality, etc.

We encourage your specific written comments.

Emailed surveys come from:

projectpulsesurveys@research.gsa.gov
Help Us Improve Our Project Management Program

Your active participation helps us to improve our project management program by informing:

- Staff Training
- Coaching / Mentoring
- Employee Recognition
- Process Improvement
- Customer Communications and Training

PBS Resource Fact Sheets
https://www.gsa.gov/real-estate/real-estate-services/for-federal-customers/pbs-resource-fact-sheets
### Upcoming Client Enrichment Series Training

See upcoming class announcements and search past session content at [www.gsa.gov/ces](http://www.gsa.gov/ces)

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<td>Say Aloha to Kahua!</td>
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<td>Policy and Process Changes for</td>
<td>Sep 8</td>
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All sessions expressed in eastern time.