



U.S. General Services Administration

A magnifying glass with a black handle and a silver rim is positioned over a set of blue architectural blueprints. The lens of the magnifying glass is centered over the text "FOCUS FOR the FUTURE".

FOCUS FOR *the* **FUTURE**

2022

F3 PBS CUSTOMER FORUM



U.S. General Services Administration



F3 PBS CUSTOMER FORUM
FOR *the* FUTURE

Thursday, June 16th, 2022

**Project Management Tools Boost
Transparency and Engagement**

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

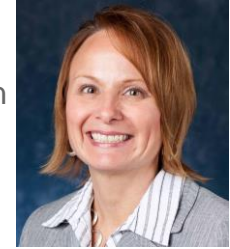
National Program Manager
Customer Intelligence
Office of Portfolio Management
and Customer Engagement
GSA-PBS



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



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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	
Pre-Planning Status	Customer enters and saves WR information
Unassigned Status	Customer sends WR to GSA ✉ Email from eRETA: New WR is submitted to GSA

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

Planning/Estimate Status	<ol style="list-style-type: none"> 1. GSA assigns PM/POC to project or service ✉ Email from eRETA: Work Request W## has been assigned 2. GSA PM/POC and Customer develop requirements (Scope, Estimates) and links an estimate in RETA --- This timeframe varies depending on type of project or service --- ✉ Email from eRETA: GSA has approved the estimate ## for W## 3. Customer enters remaining information and sends RWA to GSA for acceptance ✉ Email from eRETA: WR/RWA Sent to GSA for Acceptance
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GSA may take 15 business days to review before routing for signatures

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 ✉ Email from eRETA: Acceptance Letter

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



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Q&A - RWAs and eRETA



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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?

The screenshot shows the Kahua Network dashboard for Tina Atkins. The interface includes a navigation sidebar on the left with options like Project Finder, Apps, Dashboard, Search, Tasks, and Messages. The main content area features a welcome message, a 'Recent Tasks' table with columns for FROM, SUBJECT, and DUE, and a 'Recent Messages' table with columns for FROM, SUBJECT, and RECEIVED. There are also several summary cards: 'Tasks by App' showing a bar chart for RFIs and Projects; 'Open Tasks' with a pie chart showing 148 tasks categorized by status (Overdue, Due today, Due in 1-7 days, > 7 days, No due date); 'Recent Projects' listing various GSA domains and regions; 'Tour of Kahua' with a map icon; 'Complete Your Profile' with a person icon; and a 'Help Center' with a question mark icon. The bottom status bar indicates the user's last login time and system information.

Getting Started GSA - GSA Tina Atkins GSA

Hi, Tina. Welcome to The Kahua Network, the world's only collaborative network for construction project management.
Select one of the links below to start configuring your Kahua site.
Please note you are currently a site (domain) administrator.

Recent Tasks

FROM	SUBJECT	DUE
Ian Hilder	New Project Awaiting Assignment	
Ian Hilder	New Project Awaiting Assignment	
Ian Hilder	New Project Awaiting Assignment	
Ian Hilder	New Project Awaiting Assignment	

You have 148 open task(s). [View All](#)

Recent Messages

FROM	SUBJECT	RECEIVED
Kahua	Stephanie Golowacz is now a Kahua user for GSA Domain	1/21/2022
Kahua	Goran Simic is now a Kahua user for GSA Domain	1/21/2022
Kahua	Philip Ramos is now a Kahua user for GSA Domain	1/21/2022
Kahua	Timothy Hansmann is now a Kahua user for GSA Domain	1/20/2022
Kahua	Caleb Hansen is now a Kahua user for GSA Domain	1/20/2022

You have 503 unread message(s).

Tasks by App

RFIs
Projects

Invitation

Overdue Due today Due in 1-7 days > 7 days No due date

Open Tasks

Overdue Due today Due in 1-7 days > 7 days No due date

You have 148 open task(s). [View All](#)

Recent Projects

GSA	GSA Domain(GSA)
3P	GSA Domain(GSA)Region 03
0	GSA Domain(GSA)Central Office
WP	GSA Domain(GSA)Region 11
8P	GSA Domain(GSA)Region 08
5P	GSA Domain(GSA)Region 05

[Browse All](#)

Tour of Kahua

New to Kahua or need a refresher? These videos and guides will help!

Complete Your Profile

Be a team player by personalizing your information.

Help Center

Let Kahua Support help you.

You last logged in yesterday at 9:50 AM Central Time (US & Canada) 1.9.29.64 - FN1 kahua

Access:

Usability:

Document Integration:

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 3

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

Phase 2

Above Prospectus
(Owned / Leased Acquisition)
January - April 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.



Ready to Get Started?

It only takes a couple of minutes to finish setting up your account. Click the button below to get started now.

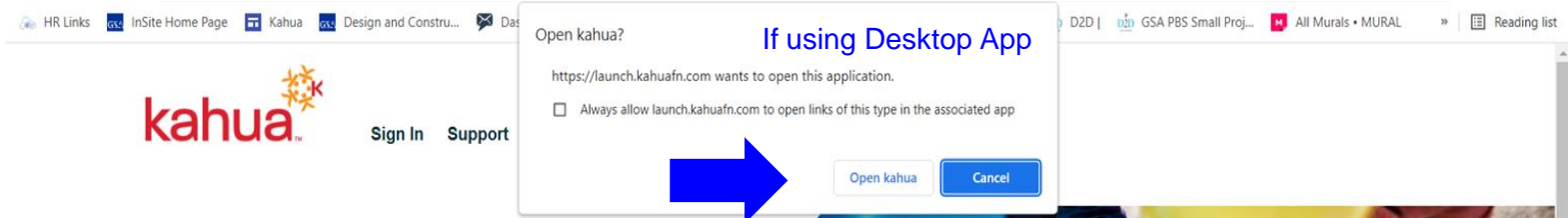
Get Started

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 →

Download for Windows

Check System Requirements

Already have the app installed on this device? [Open Now](#)



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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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Q&A - Kahua



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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



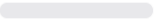
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Q&A - OASIS

How Did GSA Do? Take Our Project Pulse Survey

0%  100%

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



How would you rate your level of satisfaction with our overall performance on this project, from start through substantial completion?

- Very Dissatisfied**
- Dissatisfied
- Neutral
- Satisfied
- Very Satisfied**

Please rate each area based on whether it **Needed Improvement, Met Expectations, or Exceeded Expectations**.

	Needed Improvement	Met Expectations	Exceeded Expectations
Maintained Communication & Transparency	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Provided a Clear Point of Contact	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Defined Project Scope	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Completed on Schedule	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Completed On/Under Budget	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Resulted in Quality Work at Substantial Completion	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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

The screenshot shows the GSA website's navigation menu with 'Real Estate' selected. The main content area is titled 'PBS Resource Fact Sheets' and is divided into three sections: 'GET TO KNOW PBS', 'PROCURING YOUR SPACE', and 'EXECUTING YOUR PROJECT'. The 'GET TO KNOW PBS' section includes links for 'Basic information about working with PBS', 'PBS Client Enrichment Series - Free, (PDF - 207 KB)', and 'Introduction to Occupancy Agreement'. The 'PROCURING YOUR SPACE' section includes 'Automated Advanced Acquisition Process (KB)' and 'GSA Leasing Support Services (GLS)'. The 'EXECUTING YOUR PROJECT' section includes 'Scope, Budget, and Schedule', 'Construction Schedule Management (189 KB)', 'eRETA: External RWA Entry and Track (KB)', 'GSA's New RWA Fee Structure (PDF - Micro-Purchase Delegation of Authority) (Project Pulse Survey (PDF - 215 KB))', 'RWA Fee Reform (PDF - 265 KB)', and 'RWAs for Above Standard Tenant Impt'.

The screenshot shows the 'Project Pulse Survey' landing page. The header includes the GSA logo and the text 'U.S. General Services Administration'. The main heading is 'Project Pulse Survey' with the subtitle 'Striving for Continued Success in Service Delivery'. The page is divided into two main columns. The left column, titled 'Background and Benefits', explains that the survey aims to provide excellent customer services and evaluate performance. The right column, titled 'When is the Project Pulse Survey Administered?', provides a table of survey timing based on project type and value.

RWA Project	Leasing Project
Acceptance (for projects greater than \$25,000)	At Request for Lease Proposal
Expense Midpoint (for projects greater than \$250,000)	At Lease Award
Substantial Completion	Lease Effective Date

The bottom section, 'What Does the Survey Measure?', lists the following metrics: Overall Satisfaction, Communication and Transparency, Clear Point of Contact, Satisfaction of Requirements, Cost and Budget, Schedule, and Quality of Work.

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

Emergency Leasing

Jul 14 1pm-3pm

RWA Fundamentals

Jul 21 1pm-3pm

**Workplace Feasibility
WIFM Tool 2.0**

Jul 27 2pm-3:30pm

eRETA Digest

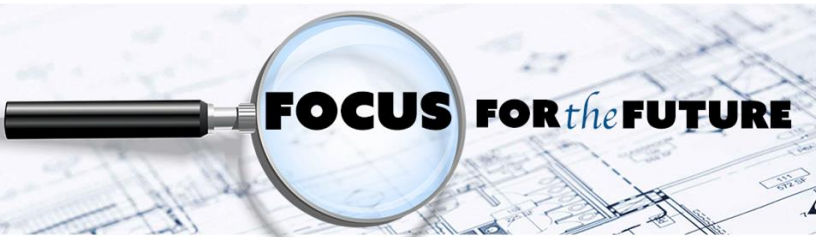
Aug 9 1pm-2:30pm

Say Aloha to Kahua!

Aug 18 1pm-2:30pm

**Policy and Process
Changes for Occupancy
Agreements (OASIS)**

Sep 8 1pm-3pm



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All sessions expressed in eastern time



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Up Next...

**Building Diversity - Infusing DEIA Principles
Into Public Projects**