

Welcome to today's presentation:

Policy and Process Changes for Occupancy Agreements

An Introduction to **OASIS** (Occupancy Agreement & Space Inventory System)

April 5, 2022

The presentation will start at 1 pm eastern

Note: Phones are automatically muted during the presentation. You can send questions to our presentation team via your Q&A pane and the team will answer as many questions as possible during the presentation. All questions will be answered in writing in a formal Q&A document, posted along with the slide deck and session recording, on our website, <u>http://www.gsa.gov/ces</u>





Today's Speakers

Our Presentation Team

Our Session Host



Lisa McCoy

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Agenda

- OASIS Background
- OASIS: Receiving, Reviewing, and Approving OAs
 - Sample New OA
 - Customer User Roles
- Timeline for Creating and Sending OAs
- Pricing Policy Changes
- Releases of Space
- Q&A





Do you currently review or approve OAs?

- Yes
- No





- GSA's new Occupancy Administration and Space Inventory System, replacing OA Tool and eOA
- Used to manage the GSA OAs and Drawings
- Customer access portal



OASIS Schedule

- Targeting April 2023 Go Live
 - Training January/February 2023
 - RentEst schedule not affected

• Policy changes expected FY23

• Process changes for OAs starting now



What is Staying the Same?

- OA still the financial agreement document with GSA
- Downloadable .pdf OA
- RentEst and Rent on the Web (ROW)
- Release of space rights



How Will You Use OASIS?

- Self-service portal to access:
 - rent data
 - OAs: receive, review, and approve
 - assignment drawings
 - ask questions about a rent bill
 - releases of space notices



Audience Poll #1

Are you currently a user of our eOA tool?

- Yes, frequently (at least monthly)
- Yes, occasionally (at least quarterly)
- Yes, but only rarely (at least yearly)
- No, what is eOA?





Are you currently a user of our Rent on the Web (ROW) tool?

- Yes, frequently (at least monthly)
- Yes, occasionally (at least quarterly)
- Yes, but only rarely (at least yearly)
- No, what is Rent on the Web (ROW)?





OASIS - Receiving, Reviewing, & Approving OAs



Receiving & Reviewing OAs

- All OAs sent through OASIS
 - Sort and filter your OAs
 - Run reports
 - Notifications in system
 - No emails, unless your action is required
- View OA data in the system or download .pdf
- Circulate internally



Sample OA Format

| | | | | | | | Financial Info | rmation | | | | | | |
|---|-------------|--|---------------|-------------------------|-------------------------|------------|---|--|---|---|---|---|--|--|
| | | | | | | | PBS Fee Percent | | | PBS Fee | Annual Amo | unt | | |
| | | OA S | Summai | rv | | | 0% | | | \$0 | | | | |
| Conoral Ir | formation | UAU | Jumma | 'y | | | | | | Princip | al Mon | thly | | |
| General II | normation | | | | | | Tenant Improvem | ent Description | | Amour | | | erest Rate | Duration |
| OA Number | | OA Type | | | | | 020 Tenant Improvement | ent Used Tenant Improve | ement costs | \$55,00 | 0.00 \$4,6 | 17.79 1.3 | 385 | 12 |
| ACA20031 | | Owned | | | | | | | Monthly | Annual | Cost per | Rentable | | |
| Cancellable | | Revision Numb | er | Amendm | ent Reason | | Shell Rates | Desciption | Amount | Amount | Unit | Sqft | | End Date |
| | | 0 | | | | | 010 Shell Rental Rate General | Shell Rental Rate for General Space Excluding WRH, TFC, and GNS | \$64.02 | \$768.29 | \$15.00 | 51.22 | 10/01/2021 | 09/30/2023 |
| Customer Ident | ifier 1 | Customer Ident | tifier 2 | Customer | er Identifier 3 | | | | | | | | | |
| | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | |
| Commencemen | t Date Vaca | te Date | | | Escalation M | lonth | 11 | | | | | | | |
| Commencemen 09/23/2021 | | te Date 3/2023 | | | Escalation M October | lonth | | | _ | _ | | | | |
| - | | | | | | lonth | | | | | | | | |
| 09/23/2021 | | | | | | lonth | | | | | | | | |
| 09/23/2021 | 09/23 | Address | City | State | October Zip Code | GSA Region | Shell Rates | Desciption | Monthly Amount | Annual Amount | Cost per Unit | Rentable Sqft | Start Date | End Date |
| 09/23/2021 | 09/23 | 3/2023 | City ACTON | State CALIFORNIA | October Zip Code | | Shell Rates | Desciption | Amount | Amount | Unit | Sqft | Start Date | End Date |
| 09/23/2021 Location I Location ID CA0001 Usable Sqft | 09/23 | Address | | | October Zip Code | GSA Region | Shell Rates Rates | Desciption | | | | | | End Date End Date |
| 09/23/2021 Location I Location ID CA0001 | 09/23 | Address 333 C Street | | CALIFORNIA | October Zip Code | GSA Region | | Description Operating Cost for | Amount | Amount | Unit Cost per | Sqft Rentable | Start Date | |
| 09/23/2021 Location I Location ID CA0001 Usable Sqft | 09/23 | Address 333 C Street Rentable Sqft | | CALIFORNIA R/U Facto | October Zip Code | GSA Region | Rates | Description Operating Cost for General Space Excluding WRH, TFC | Amount Monthly Amount | Amount Annual Amount | Unit Cost per Unit | Sqft Rentable Sqft | Start Date | End Date |
| 09/23/2021 Location ID CA0001 Usable Sqft 132.9121 | 09/23 | Address 333 C Street Rentable Sqft | | CALIFORNIA R/U Facto | October Zip Code | GSA Region | Rates | Description Operating Cost for General Space | Amount Monthly Amount | Amount Annual Amount | Unit Cost per Unit | Sqft Rentable Sqft | Start Date | End Date |
| 09/23/2021 Location ID CA0001 Usable Sqft 132.9121 RGA Contact Logan Noll | 09/23 | Address 333 C Street Rentable Sqft | | CALIFORNIA R/U Facto | October Zip Code | GSA Region | Rates 030 Operating Costs | Description Operating Cost for General Space Excluding WRH, TFC and GNS | Amount Monthly Amount \$.00 Monthly | Amount Annual Amount \$.00 Annual | Unit Cost per Unit \$.00 Cost per | Sqft Rentable Sqft 51.22 Number of | Start Date 10/01/2021 | End Date 09/30/2022 |
| 09/23/2021 Location ID CA0001 Usable Sqft 132.9121 RGA Contact Logan Noll | 09/23 | Address 333 C Street Rentable Sqft | | CALIFORNIA R/U Facto | October Zip Code | GSA Region | Rates | Description Operating Cost for General Space Excluding WRH, TFC | Amount Monthly Amount \$.00 | Amount Annual Amount \$.00 | Unit Cost per Unit \$.00 | Sqft Rentable Sqft 51.22 | Start Date 10/01/2021 Start Date | End Date |
| 09/23/2021 Location ID CA0001 Usable Sqft 132.9121 RGA Contact Logan Noll | 09/23 | Address 333 C Street Rentable Sqft | ACTON | CALIFORNIA R/U Facto | October Zip Code | GSA Region | Rates 030 Operating Costs Zero Sqft Rates | Description Operating Cost for General Space Excluding WRH, TFC and GNS Description | Amount Monthly Amount \$.00 Monthly Amount | Amount Annual Amount \$.00 Annual Amount | Unit Cost per Unit \$.00 Cost per Unit | Sqft Rentable Sqft 51.22 Number of Items | Start Date 10/01/2021 Start Date | End Date 09/30/2022 End Date 09/30/2022 |

Sample OA Content

- Removed boilerplate clause language
 - All language in Pricing Desk Guide
- Limited clauses to address specific terms such as free space, broker commission credits, planned relocations
- No ad hoc or agency-specific clauses
 - Ensures consistency
 - Avoids unapproved deviations from policy



Approving OAs

- Click approve in the system
- Can add unique identifiers for your agency
 - Up to 3 fields
- Real-time OA status
 - In progress, approved, billing
- Track revision history and review change analysis reports



Approving OAs – Approval Details

| Appr | oval: Real E | Estate Contrac | t-AAK2000 | 0-0-109133: | 1 | | | | Print | Help |
|------|--------------|----------------|-----------|-------------|--------------|---------|----------|-----------------------|--------|------|
| 4 | General | Advanced | System | Calendar | Workflow 🕨 😆 | Approve | Reassign | Request Clarification | Return | ı x |
| | | | | | | | | | | |

(Required): To setup up an approval, select the approval options and rules. During approval the status of each reviewer can be seen in the routing list.

- Attention!

Occupancy Agreement-AAK20000-0 requires your review. To access the record, click Record for Approval in the Record Information section below. When you have completed your review, go to the bottom of this screen and select either Approve, Reassign, Request Clarification, or Return.

Record Information

Record for Approval AAK20000-0

Snapshot Approval Snapshot - AAK20000 - 1 - 03-31-2022.pdf

Approval Details

Submitted By Michael Shannon

Approval Status Review In Progress

Currently Assigned To Allison Heck

Reviewer List



Approving Oas – Agency Information

| General System | Workflow Instance Associations Continue | × |
|--|---|---|
| (Required): Click Contin | nue to proceed or Close this form to return to the record. | |
| - Attention! | | |
| | | _ |
| | cupancy Agreement-AAK20000-0. Clicking approve obligates your | |
| aconcy to fund any rol | nt due for current fiscal year or continuing resolution period, and | 1 |
| | | |
| make a good faith effo | ort to obtain funding through budget and appropriations processes | |
| make a good faith effo for future fiscal years. | ort to obtain funding through budget and appropriations processes. It is your responsibility to ensure your agency's appropriate | |
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Disapproving OAs

- What if I don't approve?
 - Request clarification
 - Reject
 - Reassign to another user



Customer User Roles

- Read-Only: view agency OAs, run reports, submit releases of space and billing OA questions to GSA
- OA Ordering Officials
 - Receive OAs in a queue
 - Approve/reassign/request clarification



Customer User Roles – The "Who"

- Each agency:
 - Determines who is authorized to approve OAs
 - Can add/change internal user rights
 - Can have multiple AB codes under your role

• Estimate 5 OA Ordering Officials per AB code



Customer User Roles – Obtaining Access

- Next Steps:
 - GSA will solicit user names Q1 FY23
 - All users will need an OMB max.gov account
 - All agency users and computers are able to access max.gov





Timeline for Creating and Sending OAs



OA Timeline - Creation and Approval

- OAs created based on final offer
 - No longer sent as estimates
- Approval needed timely for award:
 - Construction award for owned
 - Lease award
- Most projects will only require this one OA approval



OA Timeline - Communication

- Prior to the OA stage, GSA still communicates project info to the customer using CPAs, and other planning documents
- During the project, GSA communicates with customers through project meetings and updates



OA Timeline - CPA

- CPAs used to plan projects
 - Outline the estimated sf and costs
 - Based upon strategic requirements
 - RentEst and the CPA will provide information needed for your budgeting process

• GSA will no longer provide a draft OA with the CPA



OA Timeline - Changes

- Why the change?
 - Overwhelming volume of OAs and versions
 - Early estimates lead to multiple revisions
 - No financial commitment before lease award / owned construction award
 - CPAs and RentEst give you the budgeting information you need



OA Timeline - Benefits

- Benefits
 - Every OA you receive will have actual costs not estimates
 - Every OA you receive will mean that a contract is ready to be executed on your behalf
 - Significant reduction in review volume
 - Trackable/reportable status
 - One place to find the OA data you need





How familiar are you with PBS' <u>Pricing Policy</u> or the <u>Pricing Desk Guide</u>?

- Very familiar, I use it all the time
- Somewhat, I know where to find it when I need it
- Not very, I know it's out there, but never view it
- What is that?





Pricing Policy Changes



Upcoming Pricing Policy Changes

- Standardize Federal Operating Cost Escalation
- Standardize Federal Parking Rate Escalation
- Tenant Improvements Billing
- Standardize SDM Reviews
- Minimize OA Approval in Leases
- Open Ended Federal Occupancy Terms



Standardize Federal Operating Cost Escalation

- All Federal OAs will escalate operating costs annually in October rather than the anniversary date of the OA
 - Improves consistency and predictability of rent changes
- Planned FY 23 implementation



Standardize Federal Parking Rate Escalation

- All Federal OAs will escalate parking rates parking annually in October
 - Same OMB escalation factor used for operating cost escalations
 - Parking and Operating will have a consistent national process



Tenant Improvements Billing

- General and Custom TI combined into one rent line
- Billed at a monthly amount, not a rate per sqft
- OA authorizes the total TI principal and maximum amortization term



Standardize SDM Reviews

- Building Remeasurements: when the building is rewalked and the drawings are updated
 - When remeasured, sqft updates will be shared with agencies through OASIS
 - OAs are NOT updated at the same time
 - Once through the budget notification period, the changes will be pushed to all OAs in the building



OA Approval for Continuing Leased Space

- For extensions, renewals, and succeeding leases that stay in place, OA approval not required
 - GSA will only ask for OA approval for a non-cancelable assignment or when amortizing new TIs or increasing sqft



Open-Ended Federal Occupancy Term

- No expiration dates on most federal occupancies
 - Release of space rights remain
 - Reflects how agencies occupy and use owned space
- A "move out date" used for short term occupancies when needed
- Will still have individual rate expiration dates





OASIS Release of Space



OASIS Release of Space Process

- Release of Space process will only be in OASIS
 - Replaces previous written notice, release mailboxes, and manual tracking
 - No other submission method will be accepted (with a transition period)
 - Can be for full or partial space release



OASIS Release of Space Approvals

- GSA formally accepts or rejects the release request in OASIS
 - Once approved, the release remains in the system until the space is confirmed vacated
- Reports and notifications of pending releases are available



OASIS Resources for Clients

Visit our <u>OASIS</u> site on www.gsa.gov

Contact us at **PBSOasis@gsa.gov**

| An official website of the United States government | United International Control of C | |
|---|--|---|
| An omcar website or the United States government | THE STORY YOU KINDY V | |
| GSA U.S. General Services A | dministration | Search GSA.gov Q |
| Buying & Selling 👻 Real Estate 🗸 | Policy & Regulations $$ | About Us 🗸 |
| Home > Real Estate > Real Estate Services > | For Federal Customers \rightarrow Occupancy Agreement and Space Assignment System (O | |
| | Occupancy Agreement and Space Assignment | For More Information |
| Real Estate Services | System (OASIS) | If you have ay questions or would like additional information, please contact |
| Overview | In early FY23, the Public Buildings Service will transition from our current occupancy Agreement tool (OATool/eOA) to a new OA application - the Occupancy Agreement and Space Inventory System (OASIS). | PBSOasis@gsa.gov. |
| Leasing | | |
| Reimbursable Services (RS) Program | The information and resources on this page will assist PBS customers in preparing for a seamless transition to the new system. | |
| Rental Policy & Procedures | Immediate Changes to GSA Processes for Occupancy Agreements | |
| Site Selection & Relocation | OASIS will provide a more efficient and effective way for you to manage your OAs, but there will be changes | |
| For Businesses Seeking Opportunities | associated with the transition. Starting immediately, for occupancies effective in the second half of FY24, we will no longer be providing Draft OAs at finalization of strategic requirements. Strategic requirements and a | |
| For Federal Customers | project's initial financial information will be provided through a completed Client Project Agreement (CPA) | |
| Policies and Resources for Managers | around 30 months prior to occupancy effective date for non-prospectus projects (around 12-18 months prior to OMB submission for prospectus projects). You will still receive a Draft OA for signature shortly before | |
| Using GSA Schedules | contract award. | |
| PBS Resource Fact Sheets | The CPA includes similar financial information as the OA, but a much more detailed identification of the | |
| Government to Citizens (G2C) | project parameters. You can review the CPA here; the financial information is captured in Part 2, section h. | |
| Occupancy Planning and Requirements | OASIS Benefits | |
| Development | OASIS offers many benefits to customers, including: | |
| Occupancy Agreement and Space Assignment System (O | A concise and easy to read OA Three open fields at the OA level for customer use, e.g., for internal tracking numbers, organization | |
| For Workers in Federal Buildings | codes/regions, notes, etc. | |
| Pool Property Utilization & Disperal | Self-service features such as downloading OAs and associated assignment drawings (where available) | |



Summary and What's Next

- First communication of many
- Submit questions to **pbsoasis@gsa.gov**
- Customer actions:
 - Consider potential changes to your current OA review process
 - Q1 FY23, PBS will request specific user names
 - Q2 FY23 User Training will be provided





Questions?



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Join us for our upcoming VIRTUAL CES sessions

eRETA Digest

May 10th, 2022 1pm-2:30pm eastern

Register Now



GSA's COVID-19 Resources for Customers

See our *COVID-19 Website* for our Emergency Response Activities

Watch CES sessions on **D** YouTube

Bookmark and binge watch all your favorite CES sessions!

www.gsa.gov/ces

clientenrichmentseries@gsa.gov