



Client Enrichment Series

Taming Timelines - Managing Project Schedules

Thursday, 22 August 2024



Welcome

Taming Timelines - Managing Project Schedules

Thursday, August 22nd

*The presentation will start at
1pm Eastern*

Note: Phones are automatically muted during the presentation. Submit questions to our presentation team via your Q&A pane and we'll answer as many questions as possible during the presentation.

All questions will be responded to in writing in a formal Q&A document, posted along with the slide deck and session recording, on our website, <http://www.gsa.gov/ces>

Introductions



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Agenda

- 01** Schedule Management Overview
- 02** Schedule Properties
- 03** A Project Manager's View
- 04** Viewing Milestones in Kahua
- 05** Setting and Managing Expectations
- 06** Takeaways
- Q&A**



01 Schedule Management

Schedule Management

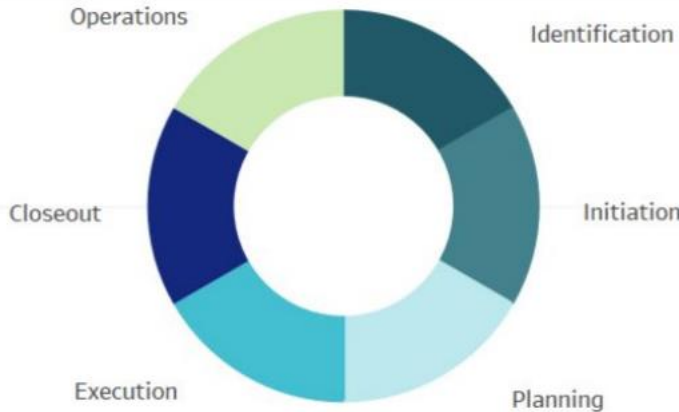
Schedule management is an essential part of project management.

Effective schedule management will assist in highlighting the project objective, report on progress and identify problems.

It occurs throughout the complete project lifecycle phases of **Planning**, **Execution**, and **Closeout**.

The project schedule is the method for achieving this.

Common PBS Project Lifecycle Phases and Definitions



02 Schedule Properties

What is a schedule?

A schedule serves as a roadmap for the entire project lifecycle from initiation through to closeout in achieving the project objective.

A schedule should define the following:

- An overall project duration
- What tasks need to happen
- When these tasks should take place and in what sequence
- Who the resources are that will be performing the tasks

A Schedule's Multiple Uses

A schedule is like a Swiss army knife. It is an excellent management tool. It assists in:

- Project management
- Cost management
- Resource management
- Risk management
- Communication

Utilizing the schedule in this way should assist GSA and our Customers in achieving a successful project.

Communication Tool

One of the keys to project success

A schedule will communicate:

- The overall plan for the project
- Project progress
- Potential issues

Determining a communication process at project outset will ensure that stakeholders are kept apprised of the project status.

Management Tool

The schedule performs as a management tool in:

- Advising on progress
- Looking ahead
- Being instrumental in assessing delays
- Providing the basis for informed decisions to be made

Schedules will vary in format based on project size and complexity

The next slide identifies areas that are consistent in all projects no matter the size.

Schedule Development

1

Scope

Defined scope
Scope creep

2

Funding

Approvals
Funds in place

3

Staff Resources

Availability
Personnel changes

4

Acquisition Considerations

FAR policy
Market research

5

Construction Variables

Overall timeline
Material lead time
Security clearances

When considering schedule development, it is vital that the project team communicate on a regular basis to assess possible issues, reaffirm project priorities and explore solutions to challenges.

Addressing Schedule Challenges: Scope

1

Scope

Defined scope

Scope creep

A project scope expresses the desired end-state of a project - how the deliverable will be used - and captures the scale and complexity of the requirement.

Properly defining a scope requires diverse stakeholder input:

- Headquarters staff (project and budget)

- Local staff (mission need and end-users)

- Specialty perspectives - IT, security, unions, legal, fire and life safety, engineering, historic preservation, industrial hygienists, etc

Your PBS PM will work with you to define/refine your scope to ensure a shared understanding of the project vision is established so it can be properly factored into your project schedule.

Addressing Schedule Challenges: Funding

2

Funding

Approvals

Funds in place

Securing funding in a timely manner

In lease projects - RWAs must be funded and accepted before lease award.

Funding Coordination - Split Funded RWAs

GSA may accept an RWA in a current fiscal year when BA 54 funds from GSA will not be available until the next fiscal year if the project is a bona fide need in the fiscal year in which the RWA is submitted

Entry into Financial Systems

eRETA (for reimbursable work) or OASIS.

Other Questions on RWAs or OASIS?

Check out www.gsa.gov/ces for Past Sessions covering RWA policy, the eRETA and OASIS tools.

Addressing Schedule Challenges: Staff Resources

3

Staff Resources

Availability

Personnel changes

Decision Making Processes

Project teams need to identify key influencers/decision makers in the critical path for project reviews and approvals.

Reviews and Sign-Offs

Teams should have a common understanding of typical review periods given current staffing resources.

Onboarding / Transitioning Team members

As team members and stakeholders change, how will the team manage transitions to ensure project continuity?

Discuss and clarify staff resources with your PM to ensure realistic time frames are factored into the project schedule and risks are identified upfront.

Addressing Schedule Challenges: Acquisition Considerations

4

Acquisition Considerations

FAR policy

Market research

FAR Policy and Regulatory Environment

Technology -

Offerors level of technical savvy may impact their ability to efficiently participate in the acquisition process (completing applications/bidding processes)

Market Research -

Contractor and resource availability

Costs may lead to contract modifications that impact schedule

Work closely with your PM and Project Team Contracting Officer to understand the schedule implications of the acquisition activities needed to support of your project.

Addressing Schedule Challenges: Construction Variables

5

Construction Variables

Construction timeline
Material lead time
Security clearances

Material Lead Time -

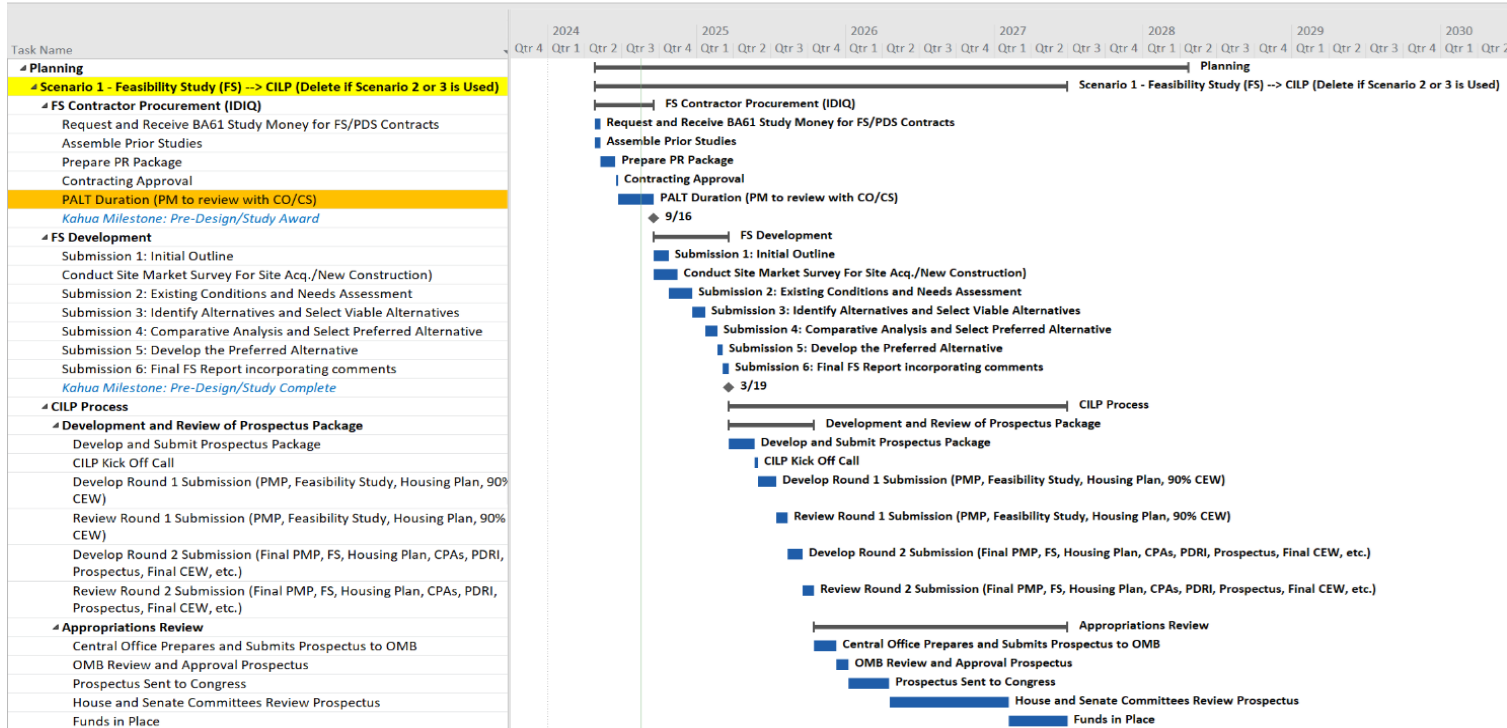
Supply chain and supply / demand considerations

Security Clearances -

Contractors and Subcontractors may require different levels of security clearance to work on your project
HSPD-12 considerations





Scalable Schedules Example: Detailed

Not all schedules look the same



Scalable Schedule Example: Small Project (Below \$250K)

This small project example lists just important milestones for a project below \$250,000 that are tracked through the project lifecycle

000028941 - GA - ATLANTA - ELBERT P. TUTTLE US CRT OF APP - Tuttle Penthouse Roof Repair / Milestones					
	MORE 				
Applicable  					
Number		Milestone Description	Baseline End Date	↑ Estimated Completion Date	Actual Completion Date
2.011	I	Project Initiated	4/25/2024	4/25/2024	4/25/2024
3.041	F	Initial Scope & Requirements Finalized With Customer	6/21/2024	7/26/2024	
4.011	E	Project Fully Authorized for Execution & Funds in Place	8/26/2024	8/26/2024	
4.401	E	PM Submits Construction or Design/Build PR Package	10/4/2024	10/4/2024	
4.491	E	Construction or Design/Build Contract Award or CMc Award	1/24/2025	1/24/2025	
4.581	E	Construction Start/NTP	1/27/2025	1/27/2025	
4.361	E	Design Complete	3/31/2025	3/31/2025	
4.691	E	Substantial Completion	6/25/2025	6/25/2025	
6.011	C	Project Closeout	10/3/2025	10/3/2025	

Select Milestones Explained

- Initial Scope & Requirements Finalized

The high level objectives of the project have been defined and documented with the customer

- Project Fully Authorized and Funds in Place

RWA has been accepted/Funding has been allocated to the project and procurement can begin

- Construction or Design/Build Contractor or CMc Award

Services have been awarded

- Substantial Completion

The project is approved for beneficial use or occupancy

- Project Closeout

Includes completion of construction, financial, customer and system closeout

Q & A Break



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03 A GSA PM's Role

What should you expect from GSA?

Every project should have a schedule, developed with your input into the schedule.

There should be a schedule developed at the start of the project. This will be based on the best information available at that time and then adjusted as needed.

The schedule should be shared with you regularly, based on the established communication rhythm, with an impact assessment as schedule changes are made, and options for risk management and recovery.

What info should be in the schedule?

Major project **phases** and **milestones**, including any **hard deadlines**.

The project's **critical path** - the succession of tasks that must be completed in order. Changes to the critical path impact the completion date.

Realistic time frames for all tasks to be completed, based on the Project Manager's experience and information provided by stakeholders.

Enough detail to **manage risk** and show the **project workflow**. For less-complex projects, a milestone schedule may be adequate.

Third party work - furniture, move, security, etc.

What are some risks to the schedule?

Scope changes that lead to delays in the design and/or construction. Early requirements confirmation is critical.

Delayed decisions by the agency during requirements confirmation and/or design.

Lack of funding availability, from either the agency or GSA. The schedule should be used from the beginning of the project to predict when funding will be needed for budget planning.

Construction price exceeds the available funding, requiring extended negotiations and/or additional funding.

04 Viewing Schedule Milestones - Leveraging Kahua

Types of schedules

Projects below \$250,000 are likely going to be milestone-only schedules

PMs are required to develop detailed schedules for projects above \$250,000.

To make the project timeline easier to understand, milestones that are important to the project are extracted from the detailed schedule

Task Name	Duration	Days	Start	Finish
Basic Small Projects Template (RWA)	442 days	646 days	Mon 10/2/23	Tue 7/9/25
Initiation	2 days	2 days	Mon 10/2/23	Tue 10/3/23
Project Start-up	2 days	2 days	Mon 10/2/23	Tue 10/3/23
Kahua Milestone: Project Initiated	0 days	0 days	Mon 10/2/23	Mon 10/2/23
Planning	55 days	79 days	Mon 10/2/23	Tue 12/19/23
Functional Requirements	20 days	29 days	Mon 10/2/23	Mon 10/30/23
Kahua Milestone: Initial Scope and Requirements Finalized with Customer	0 days	0 days	Mon 10/30/23	Mon 10/30/23
Project Planning Documents	35 days	50 days	Tue 10/31/23	Tue 12/19/23
Kahua Milestone: Project Fully Authorized for Execution	0 days	0 days	Tue 12/19/23	Tue 12/19/23
Execution	352 days	513 days	Wed 12/20/23	Thu 5/15/25
Design Phase	151 days	220 days	Wed 12/20/23	Fri 7/26/24
Design Procurement - IDIQ	80 days	118 days	Wed 12/20/23	Mon 4/15/24
Kahua Milestone: Design RFQ Issued	0 days	0 days	Fri 2/2/24	Fri 2/2/24
Kahua Milestone: Design PR Package Submitted	0 days	0 days	Fri 2/2/24	Fri 2/2/24
Kahua Milestone: Design Award	0 days	0 days	Mon 4/15/24	Mon 4/15/24
AE Design Execution	71 days	102 days	Tue 4/16/24	Fri 7/26/24
Kahua Milestone: Design Complete	0 days	0 days	Fri 7/26/24	Fri 7/26/24
Construction Phase	201 days	291 days	Mon 7/29/24	Thu 5/15/25
Construction Procurement - IDIQ	80 days	115 days	Mon 7/29/24	Wed 11/20/24
Kahua Milestone: Construction RFP Issued	0 days	0 days	Fri 8/9/24	Fri 8/9/24
Kahua Milestone: Construction or Design/Build PR Package Submitted	0 days	0 days	Mon 8/9/24	Mon 8/9/24
Kahua Milestone: Construction Award	0 days	0 days	Wed 11/20/24	Wed 11/20/24
Construction Execution	121 days	176 days	Thu 11/21/24	Thu 5/15/25
Kahua Milestone: Construction Start/Notice to Proceed (NTP)	0 days	0 days	Wed 1/22/25	Wed 1/22/25
Kahua Milestone: Substantial Completion	0 days	0 days	Thu 5/15/25	Thu 5/15/25
Closeout	35 days	54 days	Fri 5/16/25	Tue 7/8/25
Kahua Milestone: Project Closeout	0 days	0 days	Tue 7/8/25	Tue 7/8/25

2024 Qtr 1 Qtr 2 Qtr 3 Qtr 4 2025 Qtr 1 Qtr 2 Qtr 3 Qtr 4 2026 Qtr 1 Qtr 2 Qtr 3 Qtr 4 2027 Qtr 1 Qtr 2

How can you view the schedule?

Schedules can be viewed in many formats; MS Project, Google Docs, Sheets and as pdfs

All projects, regardless of dollar value, can be viewed in the Milestone app within our project management and collaboration tool - [Kahua](#).

There now follows a demonstration on how to navigate around the Milestone app.

Milestones and Schedule in Kahua

The screenshot shows the Kahua application interface. The top navigation bar includes the Kahua logo, a back arrow, a home icon, and the project name '00000024 - GA - SAVANNAH - TOMOCHICH...'. The user's name 'Wayne Frías' is visible in the top right corner. The left sidebar contains the main navigation menu with 'Apps' highlighted. The 'Apps' menu is expanded, showing a search bar and a list of categories: 'Recent', 'All Apps', 'Administration', 'Cost Management', 'Document Management', 'Index Management', 'Project Identification, Initiation and Planning', 'Reference', and 'Schedule Management'. The 'Schedule Management' category is highlighted, and its sub-menu is open, showing 'Milestones' and 'Sc Scheduling'.

<input type="checkbox"/>	↑ Number	Lifecycle Phase	Milestone Description	Baseline End Date	Estimated Completion Date
<input type="checkbox"/>	1.011	Identification	Customer Request	10/1/2018	10/1/2018
<input type="checkbox"/>	2.011	Initiation	Project Initiated	10/1/2018	10/1/2018
<input type="checkbox"/>	3.041	Planning	Initial Scope & Requirements Finalized With Customer		
<input type="checkbox"/>	3.061	Planning	Pre-Design/Study Award	10/1/2018	10/1/2018
<input type="checkbox"/>	3.071	Planning	Pre-Design/Study Complete	10/1/2018	10/1/2018

Ready to Try Kahua?

Visit our [Kahua website](#) to

- Learn about PBS project information system
- Request a Kahua account
- Access [Kahua Training](#) and [Support](#)

View the 6/25/24 Kahua class resources under “Past Sessions” on our [CES website](#).

05 Setting and Managing Expectations

Project Expectations

A schedule will assist in managing project expectations.

It will identify items that are critical to on-time completion. These typically include:

- Requirements development
- Funding
- Contractor procurement
- Installation

Delays to any of these items is likely to result in the project completion date changing.

What can you expect from GSA?

Provide an initial schedule. This will be based on the best information available at that time. The PM should inform you that as more information becomes available that the schedule could change.

Communicate with you, at an established cadence, your project status and **any updates to the schedule.**

Explain possible risks or issues that could impact the schedule.

Provide impact assessment to schedule as changes are made to the original scope - and **options for mitigation/recovery.**

What GSA expects from Client Partners

Provide input on the schedule.

Ensure resources are available per the schedule.

Inform GSA when there are holdups.
GSA can then assess if they will have a schedule impact and determine if they can be mitigated.

06 The Takeaway

Takeaway

A project will be successful when there is full collaboration between

- GSA
- Client
- Contractor

Without this collaboration the project is likely to be less than successful

A schedule is one method in achieving a successful project

Poll Question

In general, when are you provided with project schedules?

- A. On a regular cadence throughout the lifecycle of my projects
- A. Only at the beginning of my projects
- A. Only when I ask for it
- A. Schedule? What schedule?

*Don't see the poll pop-up?
Please respond in the "Chat" pane*

PBS Project Pulse Survey (PPS)

An easy way for you to provide project feedback.

Sent at key points during a project lifecycle.

Customer project POCs are asked to:

- Rate your Overall Satisfaction
- Weigh in on specific project attributes including:
 - **Schedule Communication**
 - **Managing to the Schedule**
- Offer comments about your GSA project experience

See our [PBS Fact Sheet - Project Pulse Survey](#)

Survey email - projectpulsesurveys@research.gsa.gov

Subject line - How did GSA do?...

Customer Project POCs,
please participate!

The image is a screenshot of a GSA Project Pulse Survey (PPS) fact sheet. It features the GSA logo and the text 'U.S. General Services Administration'. The title is 'Project Pulse Survey' with the tagline 'Striving for Continued Success in Service Delivery'. The document is divided into several sections: 'Background and Benefits', 'When is the Project Pulse Survey Administered?', and 'What Does the Survey Measure?'. The 'When is the Project Pulse Survey Administered?' section includes a table with columns for 'RWA Project' and 'Leasing Project', and rows for 'Acceptance (for projects greater than \$25,000)', 'Expense Midpoint (for projects greater than \$250,000)', 'Substantial Completion', and 'Lease Effective Date'. The 'What Does the Survey Measure?' section lists various attributes such as Overall Satisfaction, Communication and Transparency, Clear Point of Contact, Satisfaction of Requirements, Cost and Budget, Schedule, and Quality of Work.

Background and Benefits

PPS aims to provide excellent customer services in all aspects of project delivery. The Project Pulse Survey is a quick and easy way for customers to provide feedback on our RWA and Leasing project delivery efforts. PPS uses the valuable information to evaluate our performance and identify best practices and areas for improvement at different stages of project delivery.

We administer the monthly survey on customer RWA and Leasing space projects, regardless of cost. The brief survey is conducted online and takes just a few minutes to complete.

When is the Project Pulse Survey Administered?

Starting in the first quarter of 2021, PBS will administer the survey up to three times during each RWA and Leasing project.

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

What Does the Survey Measure?

Each brief survey's questions vary based on when in the project lifecycle the survey is sent. In general, the survey evaluates:

- Overall Satisfaction
- Communication and Transparency
- Clear Point of Contact
- Satisfaction of Requirements
- Cost and Budget
- Schedule
- Quality of Work

PPS Schedule Question Results

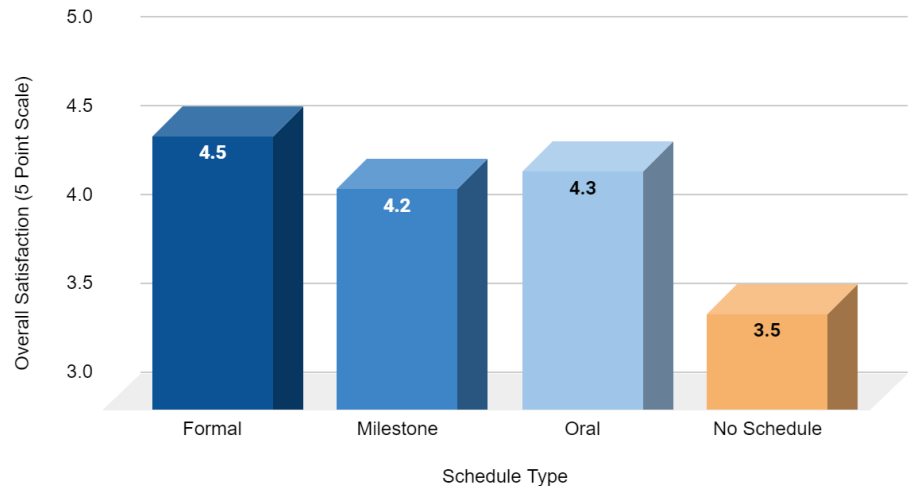
Customers cite **regular, proactive schedule communications** as an essential element of successful PBS project execution.

Even projects that have experienced schedule challenges will go on to earn **higher levels of Overall Satisfaction** if customers feel:

- Schedule issues are **brought to their attention early**
- **Mitigation options** and impacts are clearly presented
- PBS PMs **engage stakeholders** in how to deliver successfully despite a schedule hurdle

Communication of a Project Schedule strongly correlates to higher levels of Overall Satisfaction with projects.

Overall Satisfaction (5 Point Scale) vs. Schedule Type



Q & A Wrap Up



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Thank You!

For joining us for this year's
Client Enrichment Series events

**We hope you enjoyed
our FY24 program!**

See you in FY25 for topics including:

Leasing Best-Value Trade Off Analysis

Conversational Contracting

PBS Project Management Principles

Planning and Client Project Agreements (CPAs)

Watch our  YouTube [recordings](#)

visit www.gsa.gov/ces

email clientenrichmentseries@gsa.gov