

Procurement Services

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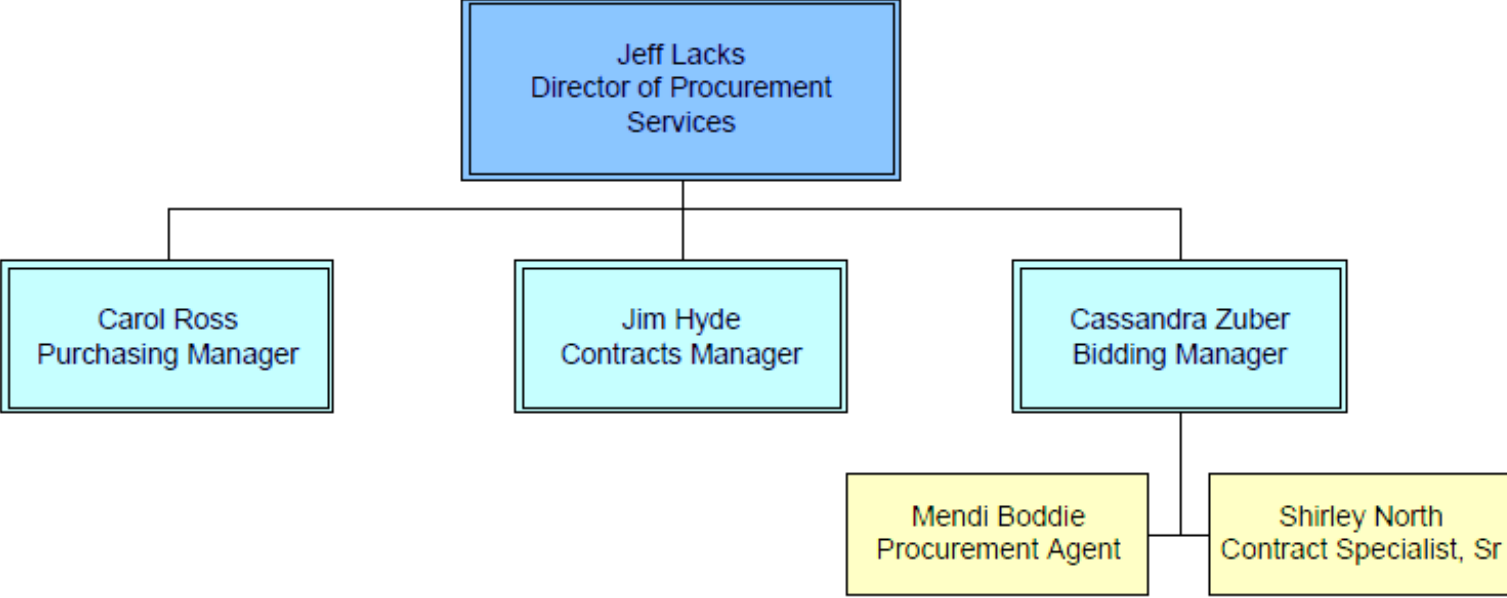


Professional
Partnership Workshop

Agenda

- About Procurement Services
 - Who Procures What
 - What Services We Procure
 - How Services Are Procured
- Overview – Procurement Processes
 - Invitation to Bid
 - Select Bid
 - Qualifications Based Selection (QBS)
- QBS Considerations, Tips & Suggestions
- Questions

Procurement Services Organizational Chart



GSFIC Procurement Services Department

The Procurement Services Department supports the Construction Division and Project Management through the procurement of various services associated with GSFIC-managed projects

Services procured:

- Design Professional Services
- Construction Professional Services
- Design-Build Services
- Other Services
 - Commissioning Agents (CxA)
 - Geotechnical
 - Special Inspections/Material Testing
 - Furniture, Fixtures & Equipment (FF&E)
 - Other Consultants as needed

Project Delivery Methods & Procurement Processes

GEORGIA CONSTRUCTION PROJECTS DELIVERY OPTIONS with Solicitation Methods for Design and Construction Professionals		
Project Delivery Method	Solicitation Method	
	Construction Professional	Design Professional
Design-Bid-Build (DBB)	ITB or SB	QBS
Construction Management/ General Contractor (CM/GC)	QBS	QBS
Design-Build (D/B)	QBS (one combined Design/Build contract)	

ITB = Invitation to Bid
 Competitive Sealed Bids
 QBS = Qualifications Based Selection
 Non-priced Proposals
 SB = Select Bid Selection
 Competitive Sealed Cost Proposal

Procurement Opportunities Advertised Fiscal Year 2016

FY-2016 (July 1, 2015 – June 30 , 2016)

GC (DBB)	70 Opportunities advertised <i>20 GSFIC-Managed Projects</i> <i>50 Using Agency-Managed Projects</i>
CM/GC	15 Opportunities Advertised
Design-Build	5 Opportunities Advertised
Design Professional	6 Opportunities Advertised
CxA	16 Opportunities Advertised
Other	7 Opportunities Advertised
Property Disposition	4 Opportunities Advertised

Opportunities Advertised FY-2016

Total 123*

*Total Solicitations Advertised to Georgia Procurement Registry

Where Opportunities/Projects Are Advertised

- GSFIC advertises on the Department of Administrative Services' (DOAS) Georgia Procurement Registry (GPR)

(Best way to locate this website is Google)

- Invitations to Bid (ITB)
- Request for Qualifications (RFQ)
- Search for opportunities on the GPR

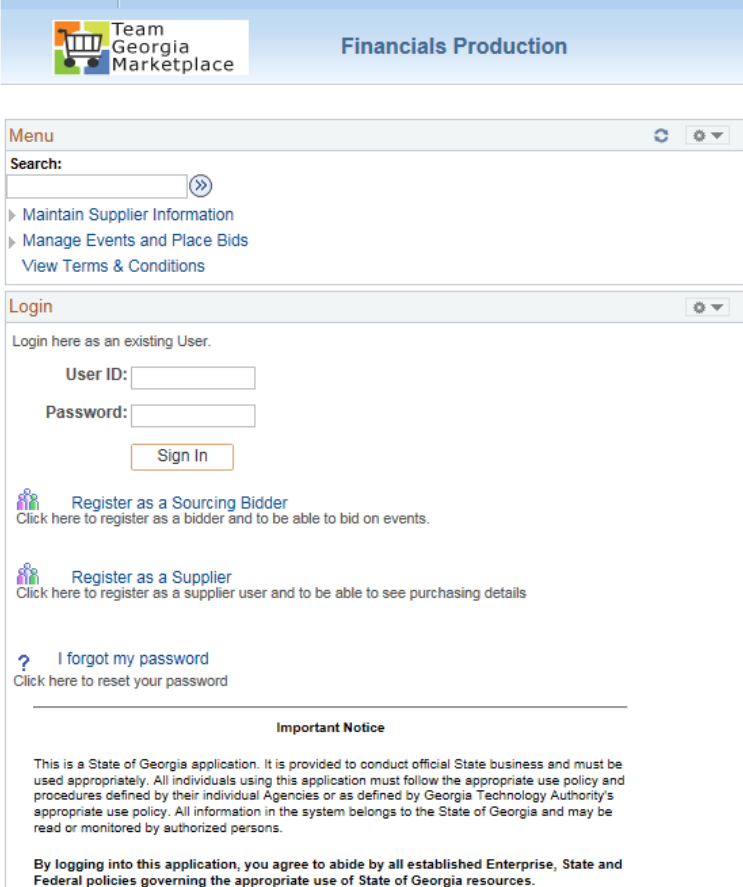
The screenshot displays the Georgia Procurement Registry (GPR) website interface. At the top, there are logos for 'Team Georgia Marketplace' and 'Georgia Department of Administrative Services'. The main navigation bar includes 'HOME', 'CONTACT US', and 'SUPPLIERS SEARCH'. A central box prompts users to 'Access Team Georgia Marketplace to register and Manage your Bidder/Supplier Profile'. Below this is a 'SEARCH CRITERIA' section with the following options:

- Type of response required:** ALL (selected), ELECTRONIC RESPONSES, PAPER RESPONSES
- Event Status:** OPEN
- Government Type:** STATE GOVERNMENT
- Select Government Entity:** GEORGIA STATE FINANCING AND INVESTMENT COMMI
- Search Title and Description:** [Text input field]
- Sort List By:** SOLICITATION EVENT NUMBER

Buttons for 'SEARCH' and 'RESET' are located at the bottom of the search criteria section. A link for 'Supplier's Guide to eSource' is visible at the bottom right of the page.

Where Opportunities/Projects Are Advertised

- Navigating the Team Georgia Marketplace
 - Register as vendor to receive notification of opportunities
 - Construction Firms should register as an Architect



The screenshot displays the 'Team Georgia Marketplace' website interface. At the top, there is a blue header with the 'Team Georgia Marketplace' logo on the left and 'Financials Production' on the right. Below the header is a 'Menu' section with a search bar and a list of links: 'Maintain Supplier Information', 'Manage Events and Place Bids', and 'View Terms & Conditions'. The 'Login' section follows, featuring a 'Sign In' button and fields for 'User ID' and 'Password'. Below the login section are three registration links: 'Register as a Sourcing Bidder', 'Register as a Supplier', and 'I forgot my password'. At the bottom, there is an 'Important Notice' section with a disclaimer about the application's use and a statement of agreement upon logging in.

Invitation to Bid (ITB)



Invitation to Bid (ITB) – Procurement Process

- GSFIC posts the invitation to bid on the Georgia Procurement Registry
 - Link to bidding module included in the invitation
- For GSFIC-Managed projects: Electronic Bidding
 - Effective January 1, 2016, construction documents were made available through the GSFIC Project Management System (e-Builder)
 - Bids are uploaded electronically in e-Builder
 - Advantages & conveniences associated with electronic bidding module:
 - Bid Documents available online at no charge
 - Automatic notification of addenda being issued
 - Bid results are emailed to registered bidders
 - No need to attend the bid opening

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Select Bid (SB) Process – What Is It?

- Select Bid is a Design-Bid-Build delivery method using a two-step process consisting of the following steps:
 - Step 1– (QBS)
 - The Request for Qualifications (RFQ) is advertised
 - Selection committee evaluates the statements of qualifications, scores and ranks firms accordingly
 - A list of firms deemed to be the most qualified/suitable to accomplish the project will be identified as eligible bidders (attempt to shortlist like size firms when possible)
 - Step 2 – (DBB)
 - The eligible firms are issued an Invitation to Bid
 - The second step in the process mirrors the traditional competitive hard bid process

Select Bid (SB) Process – What Is It?

Qualifications Based Selection Process (QBS)
+
Design-Bid-Build Delivery Method (DBB)
=
Select Bid (SB)

Select Bid (SB) Process

How are Select Bid awards determined?

- Demonstrating relevant experience/qualifications in the 1st. Step (QBS) of the process can get you on the list of select/eligible bidders
- Submitting the lowest price at bid opening gets you on the project

Select Bid is an avenue that some firms have taken to get their foot in door and begin building their resume/history with GSFIC managed projects

Qualifications Based Selection (QBS) Process

- Two step process initiated by issuance of Request for Qualifications/Request for Proposal (RFQ/RFP)
 - Step 1: RFQ
 - Step 2: RFP
- Important Reminder:
 - Read the RFQ/RFP and follow instructions

Two-Step Selection Process (Step 1)

- RFQ/RFP is advertised on GPR; document includes:
 - General project description (delivery method, project budget, estimated schedule, etc.)
 - Requested deliverables (information regarding the firm, proposed team members, relevant experience of firm & team, etc.)
 - Evaluation criteria
 - Instructions (what to submit and how to submit it)
 - Deliverables
 - Mandatory forms & affidavits (E-Verify) – failure to submit is an *automatic* disqualification
 - Page Limits
 - Upload Instructions
- Follow upload instructions; recommend calling or email to verify receipt of upload of Statement of Qualifications; email is preferable

Two-Step Selection Process (Step 1)

- Statements of Qualifications are received and distributed among selection committee

Typical selection committee comprised of (5) voting representatives from Using Agency & GSFIC

- Using Agency (2 votes)
- Campus or End User (1 votes)
- GSFIC (2 votes)



Two-Step Selection Process (Step 1)

- Committee members review submittals individually prior to meeting as a group to finalize evaluations to determine a shortlist consisting of 3 to 5 of the highest ranked firms
- Notice to Finalists issued to shortlisted firms with instructions going forward
 - Date and time of the site visit
 - Presentation/interview information

Congrats! You Made the Shortlist, Now What? (Step 2)

- Site Visit (generally mandatory) – listen to what the Owner/Using Agency is saying during the site visit; if they took the time to share it, it could be important to them
- Proposals (proposed project team & approach) – don't be afraid to color outside of the lines if that is what it takes to paint your picture
- Presentation/Interview – finalist firms are requested to participate in a presentation/interview with the selection committee

Presenting Order & Timeslots

- Who presents first, who presents last and how is this determined?

Presenting Order – timeslots for presentations/interviews are determined by random, witnessed drawing.



Presentation / Interview – What To Expect

- **Presentation Room**

- You will present in one of two rooms (sorry, random assignment)
- Available equipment in each room:
 - Internet wireless connection
 - Windows-based systems
 - Podium with microphones
 - Options:
 - Bring laptop and connect to HDMI or VGA connection (preferred option)
 - Can also bring a disc or flash drive; PC provided at each podium
 - Three wall monitors are provided (70"-80")

Presentation / Interview – What To Expect

- Presentation/interview format
 - 10 minutes minimum provided to setup
 - 30 minutes for presentation
 - 20 minutes for Q&A
 - Hasty exit by the committee (not a reflection of your presentation, please don't take it personally)

Sorry! You Didn't Get Selected, Now What?

- If you were not shortlisted...
 - Limited feedback at this stage
 - Submittals—compare and contrast with those who were shortlisted
- If you were shortlisted but not selected...
 - Option for a debrief
 - No silver bullet
 - Meaningful questions solicit meaningful answers

QBS Process Considerations, Tips & Suggestions

Statement of Qualifications

- Typical Criteria for the Initial Evaluation of Statements of Qualifications
 - Stability
 - Experience/Qualifications
 - Suitability

QBS Process Considerations, Tips & Suggestions

Statement of Qualifications

- Stability
 - Straightforward – a snapshot of your company's profile
 - Looking for red flags
- Experience/Qualifications
 - Present the right team for the project
 - Right-size experience shown with project type and size
 - Be clear about involvement in projects presented
 - Great to indicate why projects presented are relevant

QBS Process Considerations, Tips & Suggestions

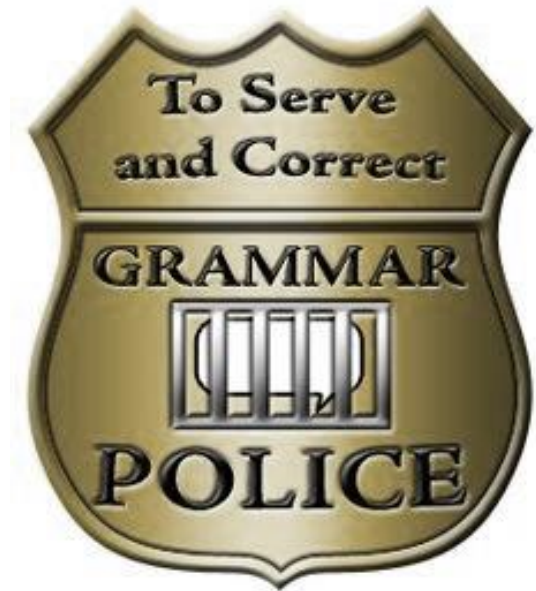
Statement of Qualifications

- Experience/Qualifications (continued)
 - Overlap – proposed team and presented projects
 - Does the team have prior experience together?
 - Does the team have experience with the Using Agency?
- Suitability
 - This section is important—not just another box to check
 - Use this as an opportunity to differentiate your company

QBS Process Considerations, Tips & Suggestions

Statement of Qualifications


- Proofread your submittal
 - Major team players should also review submittal (sorry, BD folks)
- Show you spent time on putting the book together (photos are well received)
- Follow the procurement instructions/rules!



QBS Process Considerations, Tips & Suggestions

Georgia Tech
Engineered Biosystems Building
Building Commissioning Services
Project No. J-198

April 12, 2012



QBS Process Considerations, Tips & Suggestions

Shortlist Site Visit

- Show up on time
- Listen to what Owner & Using Agency are saying is important to them
- *DPs*
 - Look at existing buildings, specifically the latest projects on campus
 - If the opportunity arises ask Owner's likes and dislikes
- *CMs*
 - Look around for potential site challenges; great chance to show your value
- Don't sneak onto the project property after site visit without permission

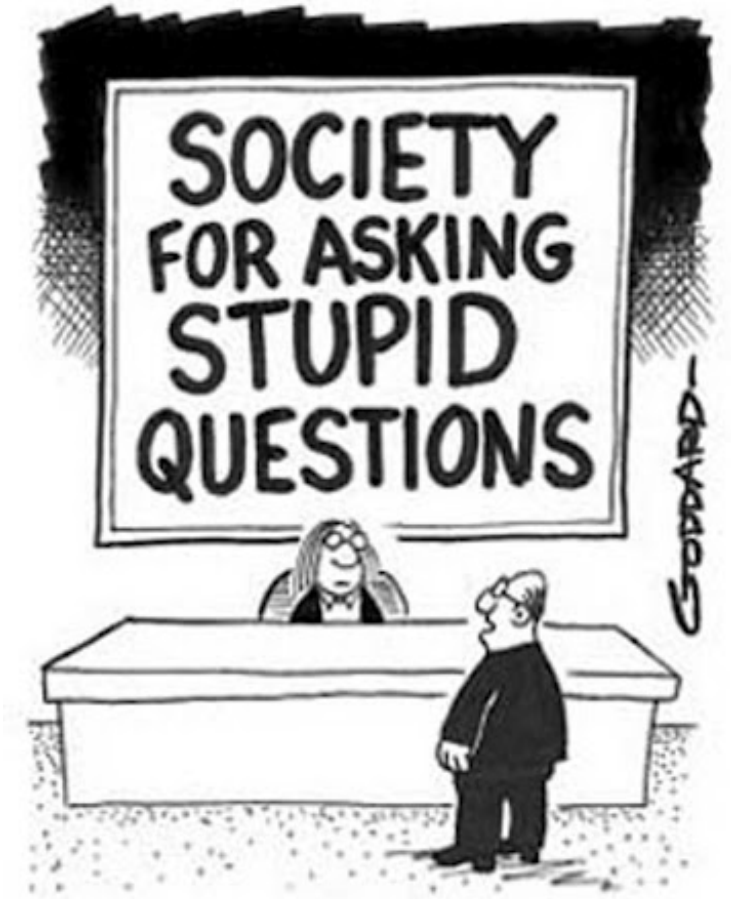
QBS Process Considerations, Tips & Suggestions

Shortlist Site Visit

- Ask questions!
...but make sure you've read the RFQ/RFP
- Use the Site Visit as an opportunity to learn more about your Owner

Preparing Your Proposal

- Use what you learned from the Site Visit
- Don't bait and switch your team



"Excuse me, is this the Society for Asking Stupid Questions?"

QBS Process Considerations, Tips & Suggestions

In the Interview – General Points

- Arrive early and bring identification
- Handouts with team information (photo, name, role) are well-received
- It's all about the flow; be prepared, know who is presenting what
- Be cognizant of the selection committee's time

QBS Process Considerations, Tips & Suggestions

In the Interview – Who to Bring

- The main team members are the key individuals we want to hear from
- It's best not to bring a lot of people without a role in the presentation
- *DPs*—if heavy engineering scope, bring applicable engineers
- *CMs*—at a minimum bring Project Executive, Project Manager and Project Superintendent; pre-con folks are also important

QBS Process Considerations, Tips & Suggestions

In the Interview – Content

- This is not the place to regurgitate your Statement of Qualifications/Proposal
- It's All About the Owner/Using Agency
 - Talk about this project—show you did your research
 - Limit your discussions of your other projects
 - Show you have thought about the project and you're already providing value to the team
- Look at the project from the Owner's perspective
- Give the committee a reason to want to select your team

QBS Process Considerations, Tips & Suggestions

In the Interview – Content

- Presenting a concept—high risk, high reward

Presented:



Delivered:



QBS Process Considerations, Tips & Suggestions

In the Interview – Q&A

- Be careful not to over-answer questions
- Avoid disagreeing with each other
- If you've had challenges on a recent project with GSFIC or the Using Agency , be ready to talk about lessons learned (up to you whether to present this without being asked)

Questions?

Questions?