



Professional  
Partnership Workshop

# Professional Partnership Workshop

Procurement Services  
with  
Jeff Lacks & Megan  
Beasinger

 LANIER TECHNICAL COLLEGE  
FORSYTH CONFERENCE CENTER

# Agenda

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

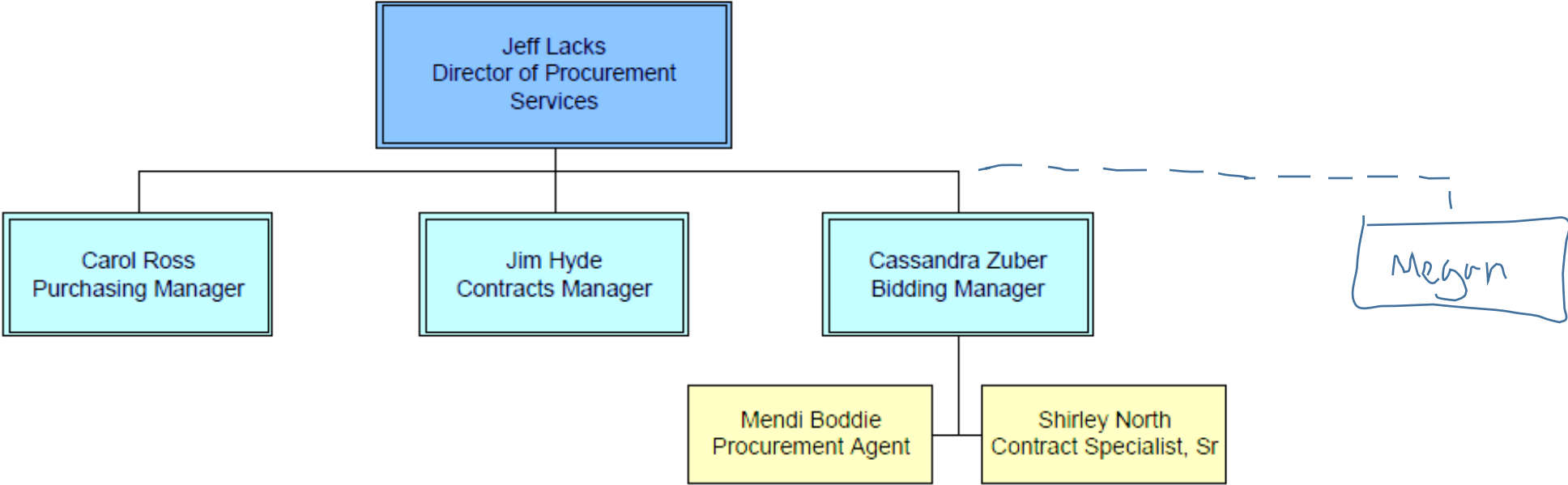
# GSFIC Procurement Services Department

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

Services procured:

- Design Professionals
- Construction Professionals
- Design-Builders
- Other Services
  - Commissioning Agents (CxA)
  - Geotechnical Engineers
  - Special Inspections/Material Testing Firms
  - Furniture, Fixtures & Equipment Providers (FF&E)
  - Other Consultants as needed

# Procurement Services Organizational Chart



# Procurement Opportunities Advertised Fiscal Year 2016

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

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

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**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)
  - Invitations to Bid (ITB)
  - Request for Qualifications (RFQ)
- Navigating the Georgia Procurement Registry
  - Register as vendor to receive notification of opportunities
  - Search for opportunities on the GPR

The screenshot shows the Georgia Procurement Registry (GPR) search criteria page. The page has a green header with the 'Team Georgia Marketplace' logo on the left and the 'Georgia Department of Administrative Services' logo on the right. Below the header is a navigation bar with 'HOME', 'CONTACT US', and 'SUPPLIERS SEARCH' links. The main content area is titled 'SEARCH CRITERIA' and contains the following information:

**SEARCH CRITERIA**  
The following search criteria may be used in any combination. If there are no Solicitation Events that meet ALL of the selected criteria, no Events will be displayed in the search results.

**Type of response required**  
A dropdown menu is shown with 'ALL' selected, and other options are 'ELECTRONIC RESPONSES' and 'PAPER RESPONSES'.

**Event Status**  
A dropdown menu is shown with 'OPEN' selected.

**Government Type**  
A dropdown menu is shown with 'STATE GOVERNMENT' selected.

**Select Government Entity**  
A dropdown menu is shown with 'GEORGIA STATE FINANCING AND INVESTMENT COMMI' selected.

**Search Title and Description**  
A text input field with the placeholder '(Enter word or phrase.)'.

**Sort List By**  
A dropdown menu is shown with 'SOLICITATION EVENT NUMBER' selected.

At the bottom of the search criteria section are two buttons: 'SEARCH' and 'RESET'.

At the bottom right of the page, there is a link for 'Supplier's Guide to eSource' and a page identifier 'GPR\_P\_index'.

# Delivery Method & Procurement Process

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

# Invitation to Bid (ITB) – Electronic Bidding Module

- GSFIC posts the invitation to bid on the Georgia Procurement Registry
  - Link to bidding module in the invitation
- For GSFIC-Managed projects:
  - 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
    - No need to attend the bid opening
    - Bid results are emailed to registered bidders



# Select Bid (SB) Process – What Is It?

- It's a Design-Bid-Build delivery method using a two-step process consisting of the following steps:
  - Step 1–
    - Request for Qualifications (RFQ) advertised
    - Selection committee evaluates the qualifications, scores and ranks firms accordingly based upon qualifications
    - A list of firms determined to be especially qualified to perform the project will be identified as eligible bidders
  - Step 2 –
    - The selected firms are issued an Invitation to Bid
    - The second step mirrors the traditional competitive hard bid process
    - Construction contract is awarded to the lowest responsive, responsible bidder

# 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

# 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

# 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)

# QBS Process Considerations, Tips & Suggestions

## Statement of Qualifications—Getting Shortlisted

- Typical Criteria for Evaluation
  - Stability
  - Experience/Qualifications
  - Suitability

# QBS Process Considerations, Tips & Suggestions

## Statement of Qualifications—Getting Shortlisted

- Stability
  - Straightforward
  - 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

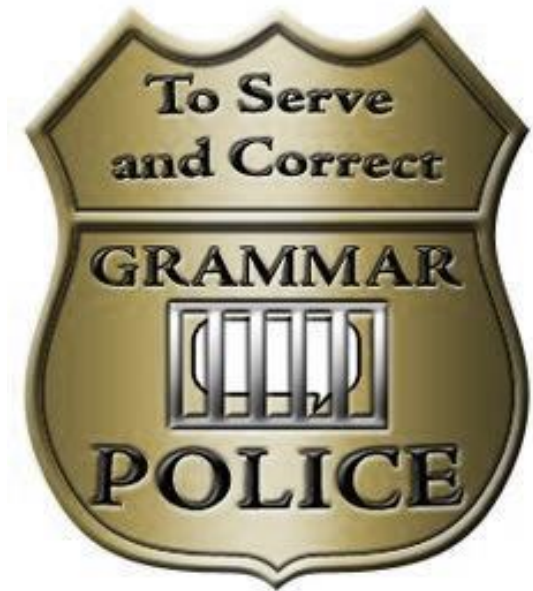
## Statement of Qualifications—Getting Shortlisted

- 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—Getting Shortlisted

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




# QBS Process Considerations, Tips & Suggestions

**Georgia Tech**

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

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April 12, 2012



# QBS Process Considerations, Tips & Suggestions

## Shortlist Site Visit

- Some common sense: show up on time
- *DPs*
  - Look at existing buildings, specifically the latest projects
  - 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



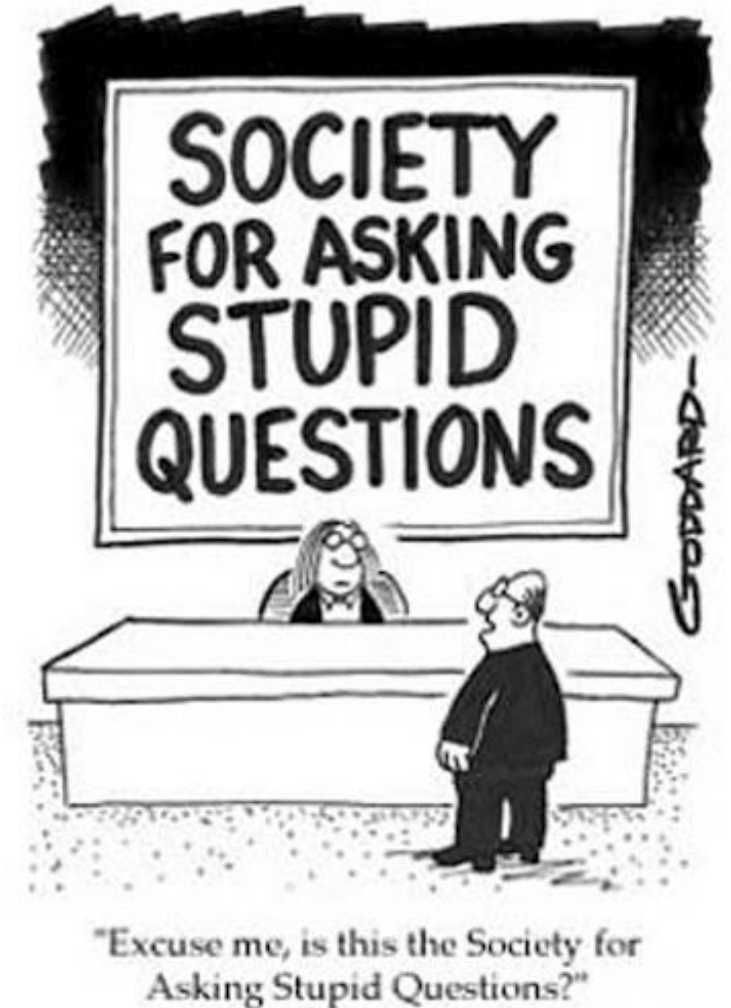
# QBS Process Considerations, Tips & Suggestions

## Shortlist Site Visit

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

## Preparing Your Proposal

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



# 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 saying 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 Us
  - Talk about this project—show you did your research
  - Limit your discussions of your other projects
  - Show you're already providing value to the team
- Look at the project from the Owner's perspective

# 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 a recent project with challenges, be ready to talk about lessons learned (up to you whether to present this without being asked)

# Questions?