Professional Partnership Workshop
Procurement Services with Jeff Lacks & Megan Beasinger
• 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
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 Opportunities Advertised Fiscal Year 2016

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

<table>
<thead>
<tr>
<th>Category</th>
<th>Opportunities Advertised</th>
</tr>
</thead>
<tbody>
<tr>
<td>GC (DBB)</td>
<td>70</td>
</tr>
<tr>
<td></td>
<td><strong>20 GSFIC-Managed Projects</strong></td>
</tr>
<tr>
<td></td>
<td><strong>50 Using Agency-Managed Projects</strong></td>
</tr>
<tr>
<td>CM/GC</td>
<td>15</td>
</tr>
<tr>
<td>Design-Build</td>
<td>5</td>
</tr>
<tr>
<td>Design Professional</td>
<td>6</td>
</tr>
<tr>
<td>CxA</td>
<td>16</td>
</tr>
<tr>
<td>Other</td>
<td>7</td>
</tr>
<tr>
<td>Property Disposition</td>
<td>4</td>
</tr>
</tbody>
</table>

**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
## GEORGIA CONSTRUCTION PROJECTS DELIVERY OPTIONS
with Solicitation Methods for Design and Construction Professionals

<table>
<thead>
<tr>
<th>Project Delivery Method</th>
<th>Solicitation Method</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Construction Professional</td>
</tr>
<tr>
<td>Design-Bid-Build (DBB)</td>
<td>ITB or SB</td>
</tr>
<tr>
<td>Construction Management/General Contractor (CM/GC)</td>
<td>QBS</td>
</tr>
<tr>
<td>Design-Build (D/B)</td>
<td>QBS (one combined Design/Build contract)</td>
</tr>
</tbody>
</table>

**Solicitation Methods**
- **ITB** = Invitation to Bid
- **QBS** = Qualifications Based Selection
- **SB** = Select Bid Selection
- **SB** = Select Bid Selection
- **CM/GC** = Construction Management/General Contractor
- **D/B** = Design-Build
- **DBB** = Design-Bid-Build

**Project Delivery Methods**
- **QBS** = Qualifications Based Selection
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- **QBS** = Qualifications Based Selection
  (one combined Design/Build contract)
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
• 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
• 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 vote)
  • 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
• 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
• Who presents first, who presents last and how is this determined?

Presenting Order – timeslots for presentations/interviews are determined by random, witnessed drawing.
• 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 – 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)
Statement of Qualifications—Getting Shortlisted

• Typical Criteria for Evaluation
  • Stability
  • Experience/Qualifications
  • Suitability
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
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
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
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
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
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
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
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
In the Interview – Content

- Presenting a concept—high risk, high reward

Presented:  
Delivered:
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?