

**DBIA MAR Owners Forum - October 26, 2010**

**Recurring Theme:**

**Project Delivery System Decision**

**Purpose**

- Use of developer led DB?
- timing good w/ strategic planning for region of DBIA
- Plus: use of all members in the discussion
- mix of product types by owner organizations (e.g. horizontal and vertical)
- Delta: summarize concept and streamline ideas generated
- use this session to help set agenda forward

**Pre-Qualification of Firms**

**General**

- Find appropriate level of information to best evaluate competition
- Use of interviews at the phase one stage to help the shortlist process
- Idea: witness shortlisted firms in a "mock" working session; how do they work together?

**Quality Firms**

- May be more appropriate for vertical work
- How are PPOs really used?
- Are these wearing out our owners and references?
- Could we simply ask for references for phone conversations?
- May be more appropriate for flat-work

**Quality People**

- Provide resume detail
- Does the firm have the proper qualifications of people to execute the work

**Value of asking for corp financial information** / bond-ability

**Value of naming key trade partners**

- Does this allow for differentiation of teams?
- Does this limit cost competition?

**Request for Proposals/Bridging Documents**

**How is bridging defined?**

- Reason for using approach - outside constraints and requirements for funding approval
- Document minimum/basic program information: correlation w/ risk and assumptions made by RFP teams
- Level of design: dependent on product type: less than 30% design complete
- Transfer of full design (0% design complete) requires level of trust in the project team

**How?**

- How do we engage the proper professionals to document bridging design? Consider use of third party to assist owner w/ matching DB solutions and ideas w/ bridging and RFP requirements
- Where do we reach for innovation?
- Distinguish to RFP teams where innovation is allowed.
- Use performance specifications. Avoid conflicts of information when using combination of performance and prescriptive.

**Transfer of info to RFP**

- Provide data/background (vision) information to DB firms during procurement
- Transfer responsibility to RFP teams to vet the bridging information via due diligence
- Take opportunity to explain assumptions inherent w/ Bridging design to RFP firms: use presentations by AE1, work-sessions w/ user groups, formal question period
- Establish scope validation period: surface conflicts and scope issues w/ RFP teams
- Based on bridging package, establish the appropriate duration of response from RFP teams

**Owner's Role in DB**

**Key Involvement Ideas**

- pricing challenges
- establishing scopes
- importance of partnering
- owner participation
- contributing factors of success
- Identify level of engagement for owner
- clarity of program/goals/business objectives
- Understanding of owner profile and culture
- Funding constraints/timing of spend
- owner criteria for PDS selection?
- Procurement decisions
- Schedule requirements may demand delivery speed: DB fastest approach to obligate construction funds
- May require O/A/C discussion to set path forward
- What about Adapt-Build?
- May limit competition: is this appropriate for owner
- Are there state/local government constraints
- Rather level of the field by clearly stating requirements for submission
- Purpose: allow teams to recover some of cost to compete; not the entire cost. Also to increase competition
- Use of Stipends
- Should these be used?
- Does the use of stipends lead to more innovative ideas?
- Role in coordinating amongst the two
- Find the appropriate balance, push for understanding of the roles
- Distinction btw Owner/End User
- Manage the change out of end users to not impact project
- Self-Education - be well informed, assess internal staff needs/capability/procedures: augment as required
- Establish and communicate the project mission/vision
- Encourage success - establish a collaborative project culture; understand the perspective of DB team members
- Project Start up
- Jointly develop roadmap for project linked to schedule - key decision points, design cross-roads, points of no return
- Where appropriate - consider Over the Shoulder process of review and feedback
- Establish design approval and compliance process
- Decision making process
- Decision making and review approach: transparent and recorded
- Establish process for accepting betterments?
- Commercial Terms
- Use a well-written contract
- Request proof of teaming agreements from DB team during RFP stage
- Decision linking back to procurement decisions - 1 vs 2 step, proper stage of design for RFP, etc.