DBIA MAR Owners Forum - October 26, 2010

Purpose

Feedback
- **Plus**
  - Use of developer led DB?
  - timing good w/ strategic planning for region of DBIA
  - 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

Project Delivery System Decision
- **challenges**
  - pricing
  - establishing scopes
- **contributing factors of success**
  - importance of partnering
  - owner participation
  - identify level of engagement for owner
- **owner criteria for PDS selection?**
  - clarity of program/goals/business objectives
  - Understanding of owner profile and culture
  - Funding constraints/timing of spend
  - Procurement decisions
  - Schedule requirements may demand delivery speed: DB fastest approach to obligate construction funds
- **What about Adapt-Build?**
  - May require O/A/C discussion to set path forward
  - May limit competition: is this appropriate for owner
  - Are there state/local government constraints
- **Use of Stipends**
  - 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.
  - Should these be used?
  - Does the use of stipends lead to more innovative ideas?

Owner's Role in DB
- **Key involvement ideas**
- **Distinction btw Owner/End User**
  - Role in coordinating amongst the two
  - Find the appropriate balance, push for understanding of the roles
  - 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
- **Project Start up**
  - Establish and communicate the project mission/vision
  - Encourage success - establish a collaborative project culture; understand the perspective of DB team members
  - Jointly develop roadmap for project linked to schedule - key decision points, design cross-roads, points of no return
- **Decision making process**
  - Where appropriate - consider Over the Shoulder process of review and feedback
  - Establish design approval and compliance process
  - Decision making and review approach: transparent and recorded
- **Commercial Terms**
  - Establish process for accepting betterments?
  - Use a well-written contract
  - Request proof of teaming agreements from DB team during RFP stages
  - Decision linking back to procurement decisions - 1 vs 2 step, proper stage of design for RFP, etc.

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
- **Qualify 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?
- **Qualify People**
  - May be more appropriate for flat-work
  - 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

Recurring Theme: