DBIA Owner Forum - Federal Focus March 16, 2010

- Criteria development
  - Considerations
    - How much information is enough to specify a quality level at RFP?
    - Specific but short of proprietary
    - What level of design is kept in-house?
    - Level of in-house expertise vs industry based
  - Risk elements
    - Level of design required to prove program fits budget
    - Reduced program definition at RFP may yield solutions not desired
  - Approach
    - Criteria designer/Bridging design outsource
    - In house vs. outsource RFP development
    - "Designer1" on board to evaluate solutions
    - Based on product type, organizations involved, location
- Source selection
  - Is design build right for your project?
    - Does it help you execute in the year of appropriation?
    - Requires lead time from project funding to capture end user requirements in prep for RFP
    - User agency preferences
  - Range from 8a thru 2-step best value - variables include:
    - Value
    - Size
    - Small business goals
    - Scope
    - Time; Urgency
    - Staff capacity
  - Honest view of owner and project profile and goals - e.g. USACE high on standards, low on risk tolerance
  - Find a way to hire people that you can trust
    - Use of pre-qualification approach
    - Other procurement vehicles: JOC, SATOC, MATOC, IDIQ, etc.
  - How is innovation driven into the process?
  - Knowledge management, lessons learned from one solicitation to the next
  - Success factors for picking DB teams?
    - Test for interaction btw various parties to the team
    - Use of interview process to evaluate team dynamic
    - Validate team named matches staff assigned
    - Will team be willing to co-locate for specific job phases
    - Use of sources sought, market sounding, draft RFP to educate teams
    - Feedback loop via debrief
    - Use of stipends
      - Allowed?
      - Source of funding
      - Project size factor
    - Use of betterments
    - Performance based award fee as a part of contract clauses
- Design management
  - Tools - DrChks, documentation, owner comments
  - Variables
    - A DB team who have worked together
    - A user representative that is engaged
    - A staff that has DB experience
  - Link btw gov't design agent and DB team designer
  - Using internal design teams to assist in the design review and approval process
  - Look for ways to keep Design1 participants engaged to explain intent and expectations
  - Identify how design and construction team members will work such that design is not treated as a sub
  - Keep user/agency on the original scope trail
  - Establish a lead customer representative
  - Can you assign Design1 to the DB team?
- Purpose
  - Establish owner needs
  - Identify challenges
  - Create 2-way discussion w/ DB community
  - Learn each others business
  - Increase owner involvement
- Owner participants
  - CDR Chris Adams: Public Works Officer, Marine Corps Base, Quantico
  - Chuck Fanshaw: Director of Engineering, National Defense University
  - Lisa Choplin: Division Chief, MD State Highway Administration
  - Douglas Paterson: National Guard
  - Jim Jones: USACE, Baltimore District
  - Lisa Jackson: President, Innovative Green Solutions
  - Courtney Severy: Centennial Contractors
  - Chris ?Palarsic?: Centennial Contractors
  - Bill Zink: Christopher Consultants
- Process/Notes
  - 1st of 3 Forums in 2010
  - Small group feel worked well
  - Good roundtable approach
  - Depth of discussion
  - Cross section of participants
  - Keep communication honest
  - Clarify purpose, invites and roles
- Actions/Next Steps
  - Make topics available
  - Engage other owners
  - Future topics
    - Define quality
    - Interaction w/ regulators