



## SESSION #8

# Design-Build Process Utilizing Competitive Acquisition

**Turner**

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# AGENDA



- 01** Competitive Design-Build Selection Methods
- 02** Key Definitions
- 03** RFQ & RFP Overview
- 04** Case Study: New Natural Resources Headquarters
- 05** Pursuing a Design-Build Project
- 06** Best Practices In Making Pursuits Attractive





# 01 COMPETITIVE DESIGN-BUILD SELECTION METHODS

# 1. Competitive Design-Build Selection Methods

## Qualifications Based Selection

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### ONE STEP PROCESS

BASED ON :

**REPUATION**

**PERFORMANCE**

**MOST QUALIFIED  
DESIGN-BUILD  
ENTITY TEAM**

**PROPOSED TEAM**

**EXPERIENCE**

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NO PRICE COMPONENT

COMMON IN PRIVATE SECTOR

# 1. Competitive Design-Build Selection Methods

## Best Value Selection

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DESIGN-BUILD  
STIPULATED SUM  
(FIXED PRICE)



**vs**

PROGRESSIVE  
DESIGN-BUILD  
(TARGET VALUE)



# 1. Competitive Design-Build Selection Methods

## Best Value Selection

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### A TWO-STEP PROCESS

#### **Request for Qualifications**

Design-Build Entity:  
Experience  
Past Performance  
Team  
Financials  
References

#### **Request for Proposals**

Design  
Schedule  
Compliance with Budget  
Project Approach



## 02 KEY DEFINITIONS

## 2. Key Definitions

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Design-Builder

Best Value Selection

Performance-Based  
Requirements  
Document

Request for  
Qualifications (RFQ)

Progressive  
Design-Build with  
Target Value

Prescriptive  
Specifications

Request for  
Proposals (RFP)

Design-Build  
Stipulated Sum

Teaming Agreement

Project Facilitator

Evaluation Criteria

Trade Partners

Proposal

Shortlist

Design Manager

Qualifications Based  
Selection

Criteria Consultant

Stipend or  
Honorarium





# 03 RFQ & RFP OVERVIEW

### 3. RFQ and RFP Overview

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#### **Request for Qualifications**

- Project Description & Purpose
- Selection Process / Evaluation Factors
- Instructions to Offerors
- Format for Submission
- Interview Yes or No
- Preview of Phase II RFP for BVS

#### **Request for Proposals**

- Project Success Factors / Goals
- Evaluation Factors / Basis for Award
- Instructions to Offerors
  - Criteria
  - Format
  - Interview

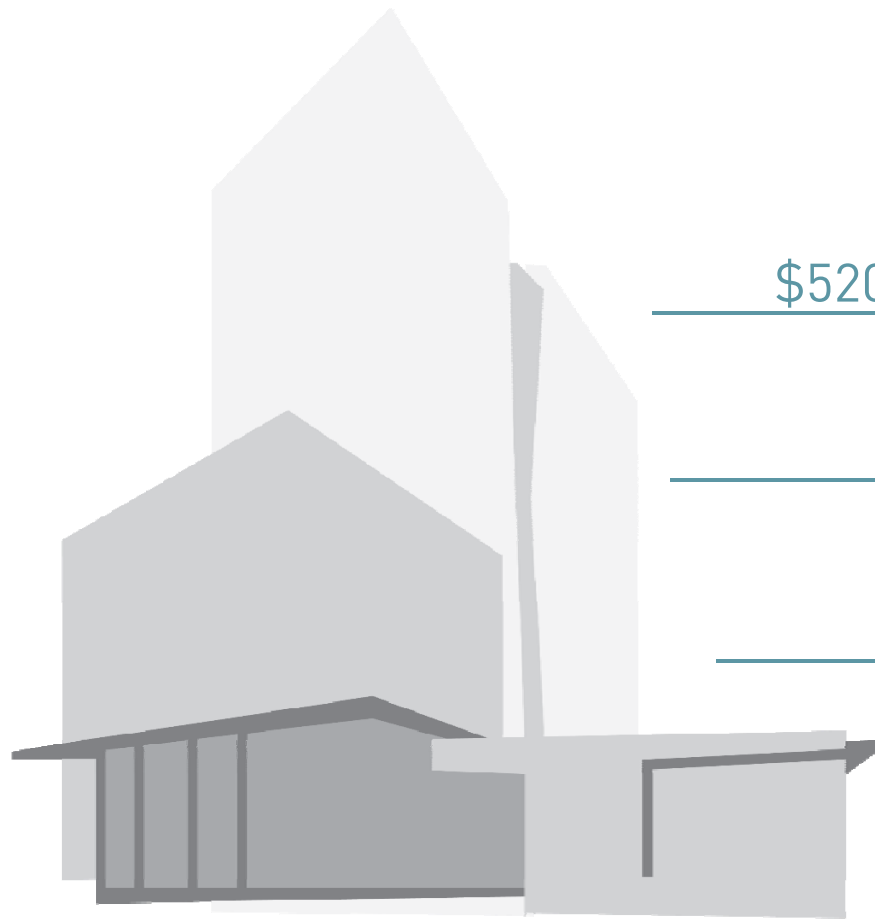


# 04 CASE STUDY: NEW NATURAL RESOURCES HEADQUARTERS

## 4. Case Study: New Natural Resources Headquarters

### Design-Build Delivery Method

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\$520M DESIGN-BUILD STIPULATED SUM

TWO-STEP RFQ AND RFP PROCESS

BEST VALUE SELECTION

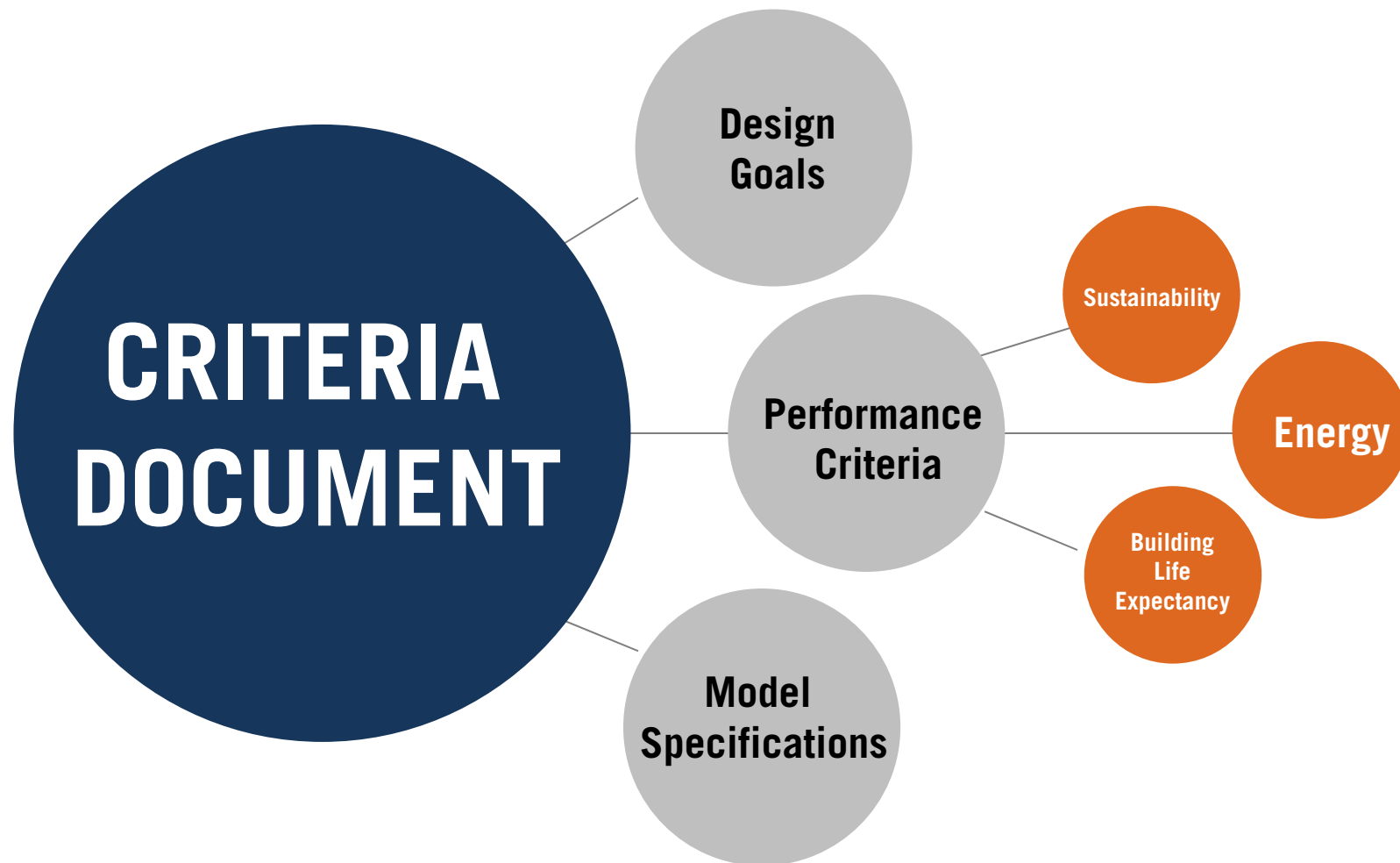
PROJECT SUCCESS FACTORS



## 4. Case Study: New Natural Resources Headquarters

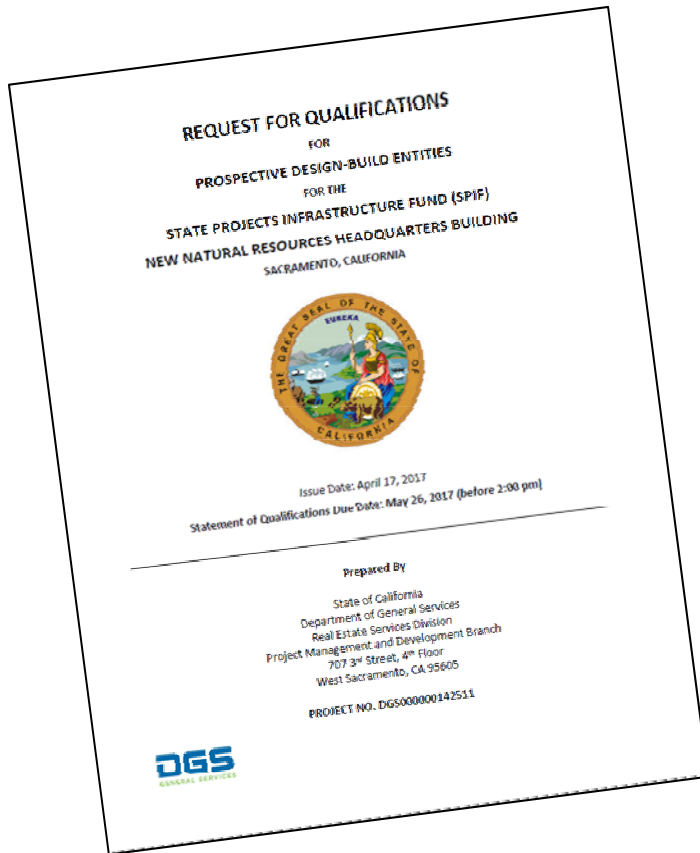
### Design / Performance / Criteria

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## 4. Case Study: New Natural Resources Headquarters RFQ Process

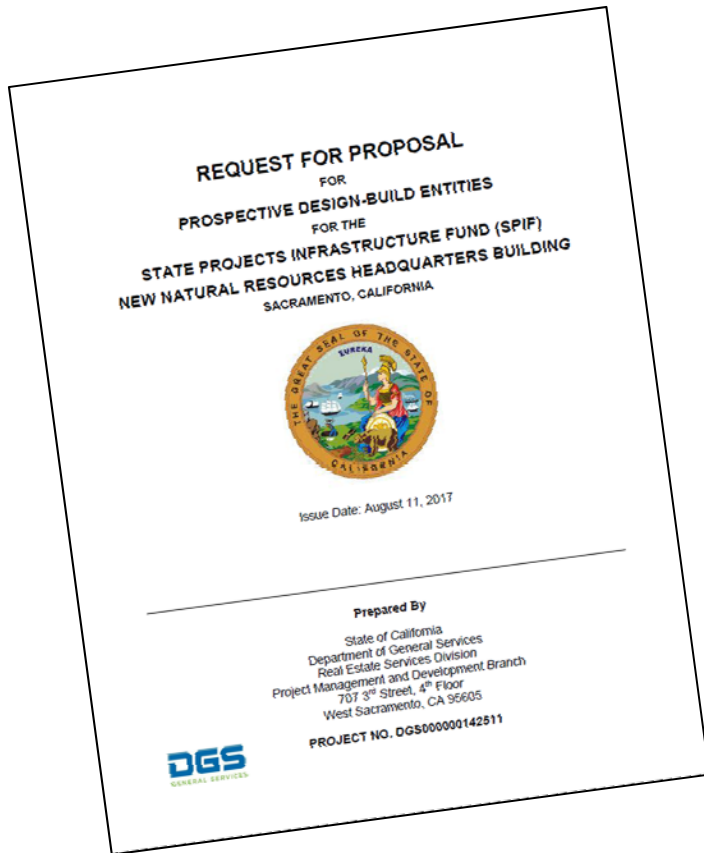
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- **RFQ Conference**
- **DBE Team and Key Staff**
- **Entity Experience**
  - **GC**
  - **A/E**
- **Past Performance / References**
- **Safety History**
- **Financials**
- **Litigation History**
- **Shortlist to no more than 5**
- **Interview**
- **Shortlist 3 DBE's to move on to RFP**

## 4. Case Study: New Natural Resources Headquarters RFP Process

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- **RFP Conference**
- **Contract**
- **Confidential Meetings**
  - **RFP Overview & Questions**
  - **Meeting #1**
  - **Meeting #2**
  - **RFP Submission Prep & Questions**
- **Format for Submission (5 volumes)**
- **Evaluation Factors**
- **RFP Review Team**
- **Interview**
- **Award / Contract / Ins.-Bonds / NTP**

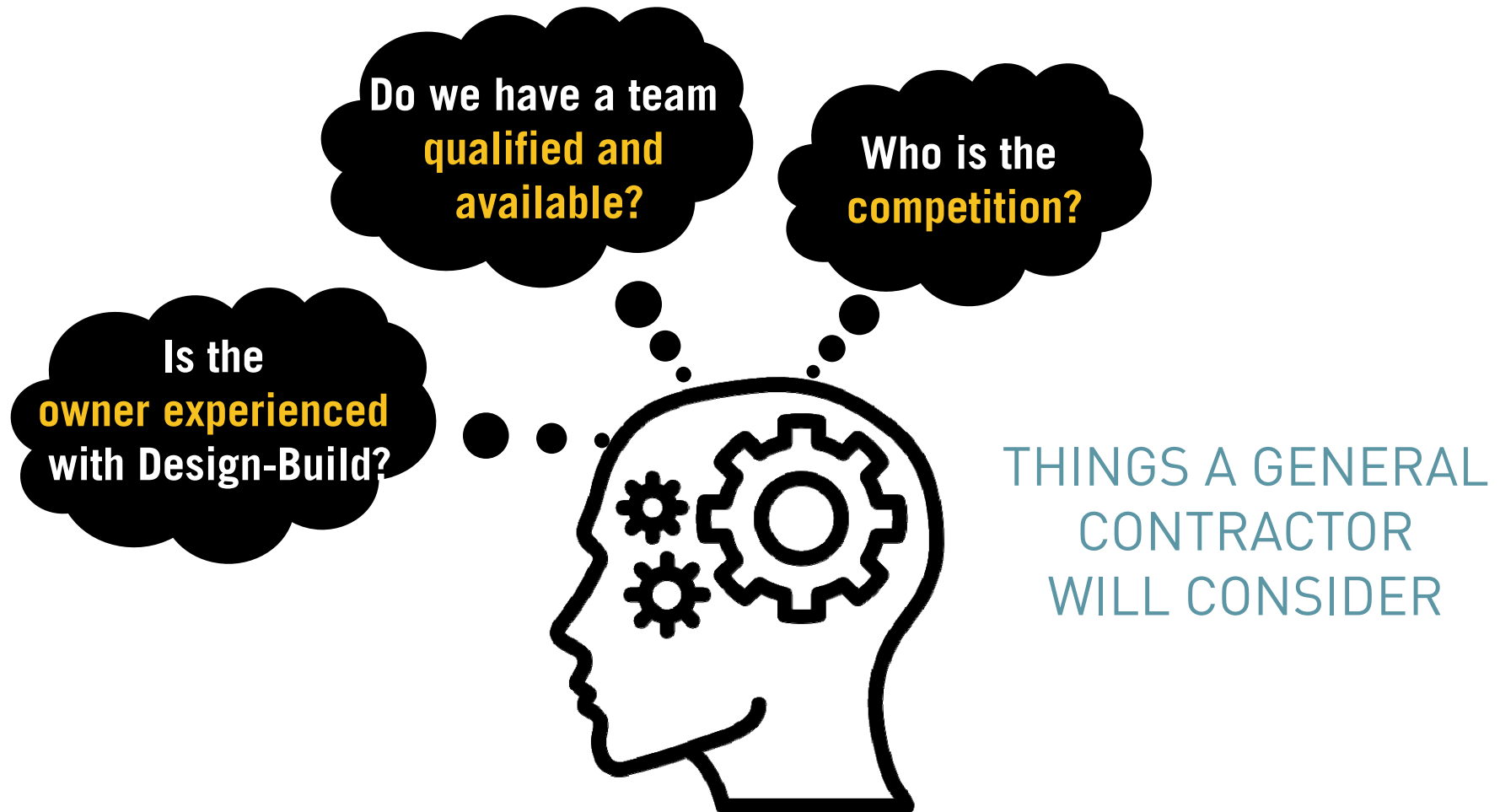


# 05 PURSUING A DESIGN-BUILD PROJECT



## 5. Pursuing a Design-Build Project Go/No-Go Analysis

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## 5. Pursuing a Design-Build Project Go/No-Go Analysis

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IS THE TARGET VALUE OR  
STIPULATED SUM  
REALISTIC?

WHAT IS THE  
COST TO PURSUE  
VERSUS  
STIPEND AMOUNT?

## 5. Pursuing a Design-Build Project Go/No-Go Analysis

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CRITERIA DOCUMENTS:

QUALITY?

PRESCRIPTIVE?

## 5. Pursuing a Design-Build Project Go/No-Go Analysis

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HOW MANY TOUCH POINTS DOES THE OWNER  
PROVIDE THE DESIGN-BUILD ENTITY?

**Confidential  
Meetings**

**Q&A  
Periods**

**Contract  
Discussions**

**Selection  
Interviews**



## 5. Pursuing a Design-Build Project Go/No-Go Analysis

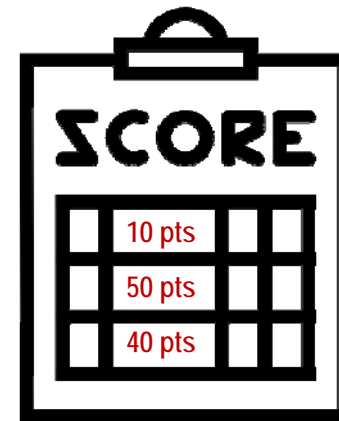
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HOW CLEAR IS THE BASIS OF SELECTION?

SHORTLIST



SCORING CRITERIA



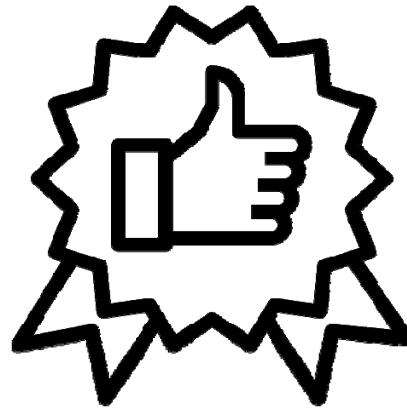


# 06 BEST PRACTICES IN MAKING PURSUITS ATTRACTIVE

## 6. Best Practices in Making Pursuits Attractive

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OWNER STAFF WITH  
DESIGN-BUILD  
EXPERIENCE  
**IF NEW, CONSIDER  
HIRING A CM/PM**



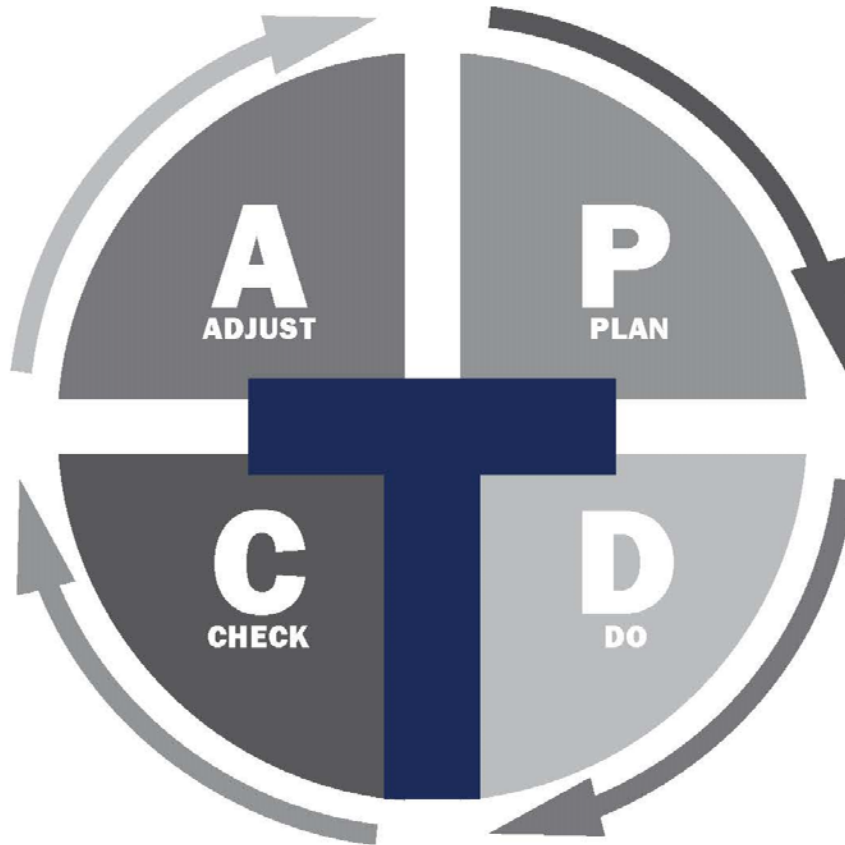
ENSURE CLEAR  
CRITICAL SUCCESS  
FACTORS  
**THESE ARE THE GOALS  
AND VISION FOR THE  
PROJECT**



INCLUDE OWNER  
CONTRACT  
**THE RFQ CAN REFER TO IT  
(DBIA OR CUSTOM).  
THE RFP MUST INCLUDE IT**

## 6. Best Practices in Making Pursuits Attractive

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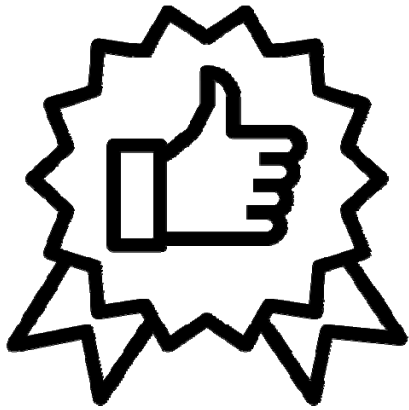
MODEL LEAN  
CULTURE

**REQUEST EXAMPLES  
OF LEAN CULTURE  
AND PRACTICES**



## 6. Best Practices in Making Pursuits Attractive

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### REQUEST FOR QUALIFICATIONS

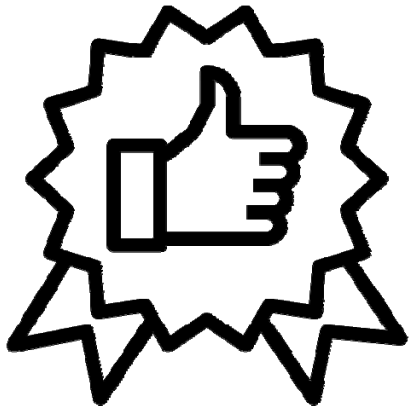
**QUALIFICATIONS REQUESTS ALIGN  
WITH THE SIZE AND SCOPE OF THE PURSUIT**

**CONSIDER WHETHER THE GENERAL CONTRACTOR  
AND THE ARCHITECT/ENGINEER MUST HAVE  
DESIGN-BUILD EXPERIENCE TOGETHER**

Example: K-12 Pursuits

## 6. Best Practices in Making Pursuits Attractive

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### REQUEST FOR PROPOSALS

#### **ENSURE CRITERIA DOCUMENT IS CLEAR**

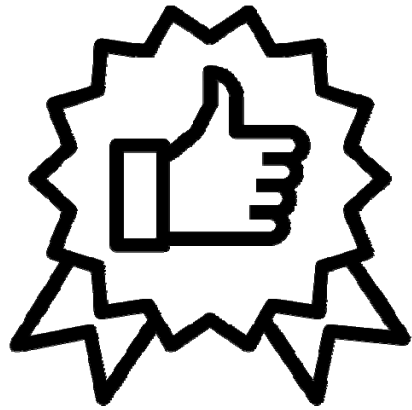
Include performance requirements, sustainability, and energy goals

#### **DO NOT MAKE THE CRITERIA DOCUMENT TOO PRESCRIPTIVE**

Allows for design innovation

## 6. Best Practices in Making Pursuits Attractive

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### THE MONEY

**ENSURE TARGET VALUE OR STIPULATED SUM IS COMMENSURATE TO THE SCOPE AND PERFORMANCE CRITERIA OF THE PROJECT**

**SCALE THE EFFORT REQUIRED BY THE RFP TO THE STIPEND IN MIND**

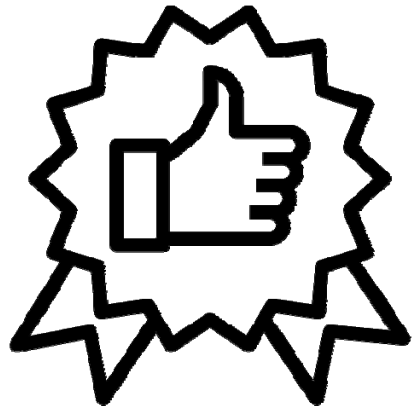
**ENSURE ADEQUATE TIME IS PROVIDED BEFORE SUBMISSION THAT EQUALS THE EFFORT EXPECTED IN THE PURSUIT SUBMITTAL**

**INCLUDE INCENTIVES**

Example: UC Davis

## 6. Best Practices in Making Pursuits Attractive

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### ALLOW FOR MULTIPLE CONFIDENTIAL MEETINGS

**RFP OVERVIEW AND QUESTIONS & ANSWERS**  
**CONFIDENTIAL MEETING #1**  
**CONFIDENTIAL MEETING #2**  
**OPTIONAL RFP SUBMISSION AND INTERVIEW**  
**PREP + FINAL QUESTIONS & ANSWERS**



### REQUIRE INTERVIEWS AT RFQ STAGE



### SHORTLIST ONLY THREE (3) DESIGN-BUILD ENTITIES TO GO INTO RFP PHASE



# QUESTIONS & ANSWERS