

INITIATE CHANGE

2018 ROCKY MOUNTAIN REGIONAL CONFERENCE



Understanding the Roles and Qualifications of an Owner's Consultant in Design-Build

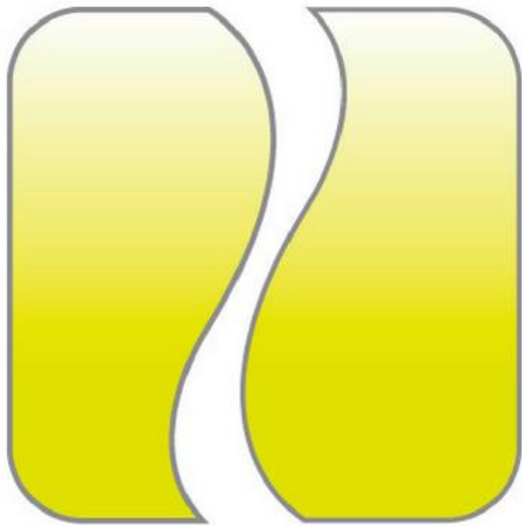
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Evolution of the Owner's Consultant

In a Linear Design-Bid-Build

- ✓ Driven by the Owner's desire to "feel more represented" during procurement, design, and construction processes.
- ✓ Role, to some degree, is fulfilled by the PM or CM or design professional.
- ✓ Consultant often viewed as an adversarial role – a position between the Designer or Builder and the Owner.

In a Collaborative Design-Build Environment

- ✓ Must serve a broad spectrum of design-build Owners, from new to experienced.
- ✓ Requires a broader skillset.
- ✓ Consultant must serve in a "facilitative" role to encourage and support collaboration.



Why is an Owner's Consultant Important?

What is the primary underlying factor leading to inconsistency in RFQs and RFPs?

- ✓ Owner's lack of understanding of procurement from both the Owner's perspective and the competing design-build teams' perspective.
- ✓ Owner's lack of experience preparing performance requirements/substantive metrics.
- ✓ Owner's lack of clear understanding of the many variations of design-build.
- ✓ Absence of a well-defined scope of services for the Owner's Consultant.

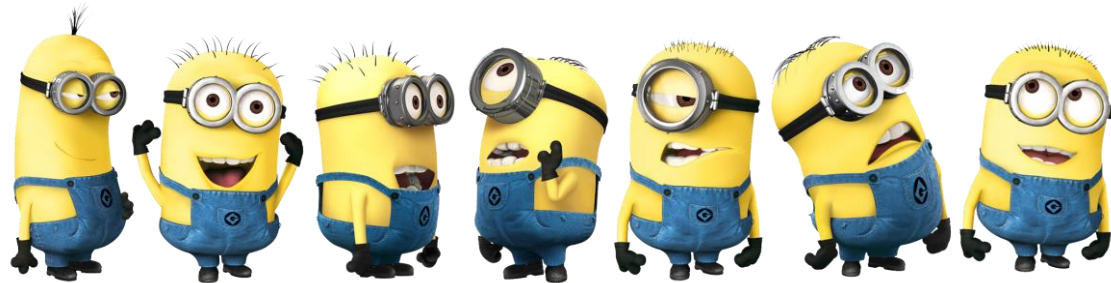
Terminology – Who Does What?

Terminology varies based on various factors including:

- ✓ Services provided
- ✓ Market sector
- ✓ Region of the country

Most common titles include:

- ✓ Criteria Consultant (or Criteria Professional)
- ✓ Owner's Advisor
- ✓ Owner's Representative
- ✓ Owner's Agent
- ✓ Owner's Engineer
- ✓ A/E 1



With which term or role are you most familiar?

- ✓ Criteria Consultant (or Criteria Professional)
- ✓ Owner's Advisor
- ✓ Owner's Representative
- ✓ Owner's Agent
- ✓ Owner's Engineer
- ✓ A/E 1

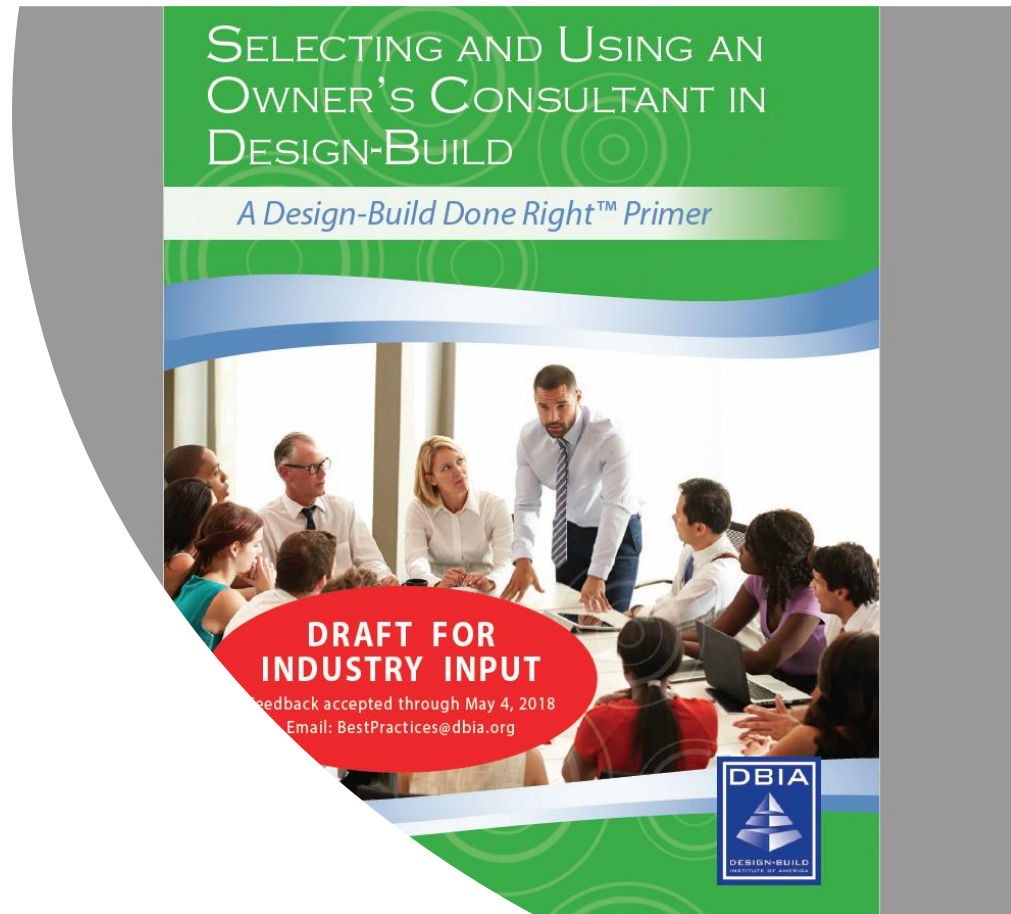


“Owner’s Consultant” Defined

“An Owner’s Consultant is a design and/or construction consultant or consulting firm that is employed or engaged by an Owner to assist in various services. This can begin with organizing, developing and administering the selection process and for other consulting services such as review of design criteria and construction process for compliance with the RFP.”



Owner's Consultant Role in Design-Build



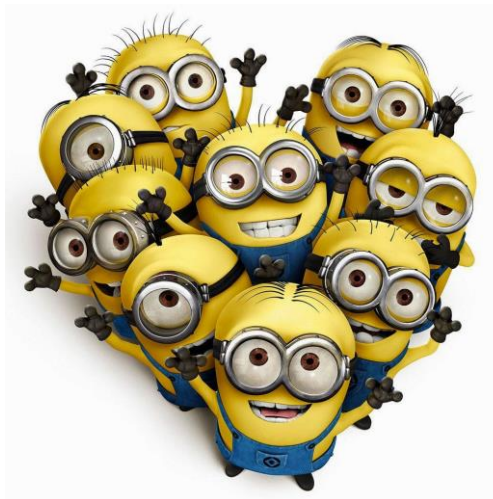
Role and Qualifications and Scope of Services

- ✓ Owner's Consultant Qualifications
- ✓ Typical Scope of Services

What is the most important skillset for a highly effective Owner's Consultant in Design-Build?



- ✓ Leadership
- ✓ Technical
- ✓ Facilitative



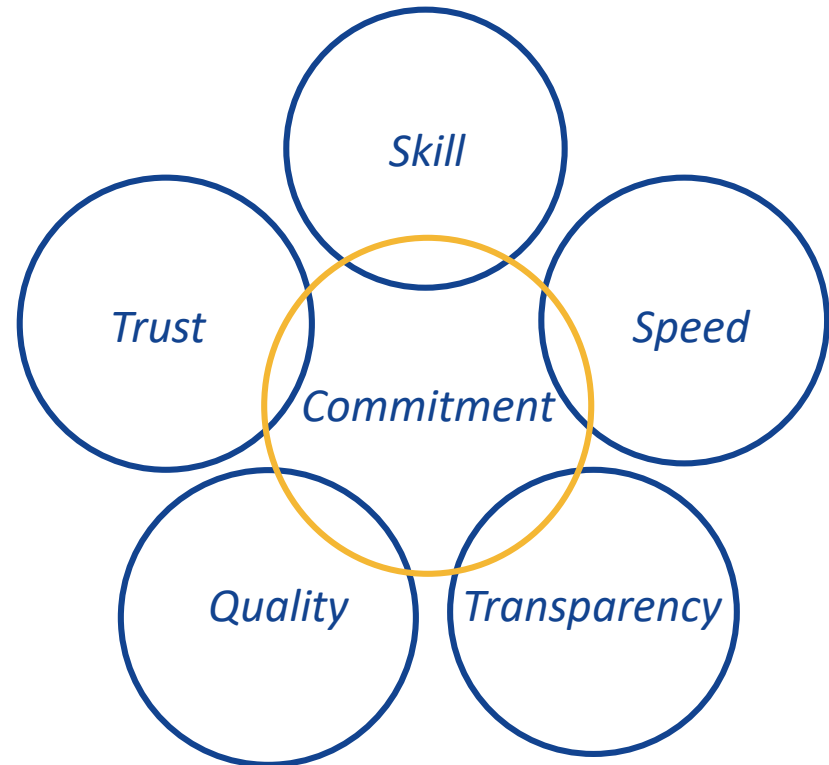
Generally, All of the Above

- ✓ Leadership skills
- ✓ Technical skills
- ✓ Facilitative skills



Why are all three necessary for effective Owner's Consultant delivery?

- ✓ Leadership skills
- ✓ Technical skills
- ✓ Facilitative skills



What is the most important service an Owner needs from an Owner's Consultant for a successful design-build project?

Scope of Services – key areas:

- ✓ Closing the Knowledge Gap
- ✓ Pre-Award Support – Phase 1
- ✓ Pre-Award Support – Phase 2
- ✓ Post-Award Support/Administration

Closing the Knowledge Gap

- ✓ Develop an acquisition strategy
- ✓ Confirm statute and policy
- ✓ Educate and orient Owner organization
- ✓ Define intersection of regulatory approvals and delivery method
- ✓ Develop and explain delivery evaluation and selection options/procedures
- ✓ Facilitate risk assessment and mitigation
- ✓ Validate approach with market providers
- ✓ Support budget development

DO YOU UNDERSTAND?

YES!
I can explain it.



I might need
MORE HELP.



Owner's Consultant Role in Delivery Method Evaluation

- ✓ Sometimes assists Owner in the analysis and selection of a project delivery method.
- ✓ Requires a consultant with a broad understanding of various delivery methods.
- ✓ Consultant must be committed to an “objective” evaluation of pros and cons of each method.
- ✓ Owner's Consultant scope and role will be defined according to the delivery method selected.



Pre-Award Support – Phases 1 and 2

- ✓ Define project objectives and priorities
- ✓ Manage expectations
- ✓ Develop procurement plan, schedule, and procurement procedures
- ✓ Support RFQ, RFP and Contract development
- ✓ Facilitate competitive process
- ✓ Establish qualifications criteria and selection methodology
- ✓ Provide cost validation
- ✓ Facilitate collaboration with shortlisted proposers/selected firm
- ✓ Support contract negotiations for best value to Owner



Post-Award Support/Administration

- ✓ Engage formal partnering program development and implementation
- ✓ Develop and implementation project execution planning
- ✓ Monitor costs/review payment requests
- ✓ Facilitate project meetings and progress reviews
- ✓ Monitor conformance to requirements
- ✓ Support project construction quality reviews/compliance
- ✓ Minimize project disputes and provide proactive claims avoidance initiatives
- ✓ Support project completion and closeout; performance reviews
- ✓ Support incentive/award fee program



Other things to consider...

- ✓ Prescriptive and performance criteria – well-written performance requirements that establish the project goals, challenges, and constraints.
- ✓ With a more performance based DB approach, the Owner leverages collaboration, innovation, budget/cost management, and risk transfer opportunities.
- ✓ Additional resources:
 - ✓ DBIA Universally Applicable Best Practices
 - ✓ DBIA Code of Professional Conduct, Conflicts of Interest
 - ✓ DBIA 400 Standard Forms (RFQ, RFP, guide and accompanying documents)
 - ✓ DBIA 501 Standard Form of Contract for Design-Build Consultant Services
 - ✓ Choosing A Project Delivery Method



Q & A



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