

What Prime Consultants Expect



*What You Should Know
Tuesday, February 2, 2021*



What Prime Consultants Expect

- **Topic** - What Prime Consultants Expect
- **Learning Objective** – Provide participants with a clear understanding of the expectation of the prime consultant
- **Length of Course**- 60 minutes



What Prime Consultants Expect

■ Before the RFP

- *Understand the project*
- *Understand what are you selling*
- *The basics: Be prepared. You may only get one shot*
 - Insurance
 - Business Certificate
 - S/M/W/D/VBE Certification
 - Prequalification
 - Understand and articulate your value – Why should the prime use you
 - Have resources ready



What Prime Consultants Expect

Understand What you are Selling: Excerpt from RFP

Each Selection Committee Member will evaluate each Qualification and Technical Proposal, assigning a raw score for each category on a scale of 0 to 10 as follows:

- Outstanding (9–10): depth and quality of response offers significant advantages.
- Superior (7-8): exceeds RFQ/RFP requirements with no deficiencies.
- Sufficient (5-6): meets RFQ/RFP requirements with no significant deficiencies.
- Minimal (3-4): meets RFQ/RFP requirements but contains some significant deficiencies.
- Marginal (1-2): comprehends intent of RFQ/RFP but contains many significant deficiencies.
- Unsatisfactory (0): requirements not addressed and lack of detail precludes adequate evaluation.

Example: Why YOU! Your Pitch...

- Higher education portfolio
- Full-service capabilities
- Dedicated Philadelphia or local based team
- Online project controls system
- Three local offices
- Commitment to student mentoring (differentiator)



What Prime Consultants Expect

■ Solicitation Process: You Get the Call

- *Get a copy of the RFP*
- ***Read the Solicitation***
- *Ask for a copy of the prime contract if it is not in the RFP*
- *Ask for draft copy of the subcontract*
- *Understand your role on the project and position on the organization chart*
- *Duration- How long will your services be required on the project*
- *How much is your fee/hourly billable rate/MU? What is the billing schedule*
- *What costs are included and what is reimbursable?*
- *Always respond in writing*
- *Be timely – 24 hours or less*
- *Have firm credentials, bio's, resumes, project tear sheets ready.*



What Prime Consultants Expect



KEEP CALM AND Read the RFP

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 1818 Market Street
 Philadelphia, PA 19103

TASK LIST
LAW ENFORCEMENT CTR
 4801 MARKET STREET
 PHILADELPHIA, PA

December 23, 2014

Client Name: City of Philadelphia
 Proposal/BFP#/STV Log #: [Redacted]
 Owner's Representative Services / \$7435

Proposal Manager: Marlon Kasi
 Due Date & Time: January 21, 2014 @ 5:00 pm

Programming Development		
Establish and Document Project Requirements		
Confirm project strategy		
Develop site and project logistical requirements		
Develop project quality requirements		
Development of a Zoning and Site Development Strategy Plan		
Public Outreach & Public Information/Involvement Program		
Assist the Owner in developing and implementing a strategy to educate stakeholders		
Comprehensive Traffic Study		
Coordinate architectural programming stage activities		
Become familiar with the facility space needs of the using agencies and clarify the City's expectations		
Document the Owner's Project Requirements required for the building commissioning process		
Chair all design review meetings		
Conceptual Design Development		
Ensure A/E obtains sign-off of all utilities including PECCO ACT 129 pre and final application		
Provide zoning plan and site development strategy plan		
Advice on site use and improvements, construction phasing, selection of materials, building systems Stop page. 9		
Establish project schedule, budget & phasing alternatives		
Coordinate evaluation of the conceptual design elements for constructability, ease of maintenance, life cycle value and comparative cost		
Review CM comprehensive budget		
Review CM master schedule		
Attend regular project management meetings		
Review soils reports		
Develop site and project logistical requirements		
Schematic /Design Development/and Final Construction Documentation Phases		
Review and monitor design		
Review and monitor construction drawings		
Review and monitor specifications		
Facilitate coordination of trade work in A/E documents		

012313_Phil Law Enforcement Ctr_Task Analysis.xls 1 OF 5



What Prime Consultants Expect

- **Example – What’s Required**
 - *Firm’s Staffing Proposal for the Project Form*
 - *Key Team Member Resume Forms*
 - *Firm’s Project Approach Form*
 - *SBE Form*
 - *MBE Form*
 - *State Business Registration Certificate*
 - *Local Business Registration Certificate*
 - *Disclosure of Investment Activities in Iran Form*
 - *Price Proposal*
 - *Bid Bond*
 - *Performance Bond*



What Prime Consultants Expect

■ Insurance – What’s Required Cont.

- *Workers’ Compensation and Employer’s Liability Insurance shall be provided for CM and Subconsultant employees working on the Project site, in accordance with applicable state laws. Separate policies will be provided reflecting the following coverage and limits of liability:*
- *Workers’ Compensation Applicable Statutory Benefits*
- *Employer’s Liability*
- *\$1,000,000 Bodily Injury by Accident*
- *\$1,000,000 Bodily Injury by Disease - Policy Limit*
- *\$1,000,000 Bodily Injury by Disease - Each Employee*
- *2) Commercial General Liability Insurance shall be provided on an “occurrence” basis under a master liability policy. Certificates of Insurance will be provided to CM and all tiers of enrolled Subconsultants reflecting the following Limits of Liability:*
- *\$2,000,000 Bodily Injury and Property Damage Liability Combined Single Limit each occurrence (per Region)*
- *\$5,000,000 General Aggregate Limit (per Region) reinstated annually*

What Prime Consultants Expect

- **The interview**
 - *Be ready to participate*
 - *Have staff available*
 - *Understand your role*
 - *Support your prime consultant*
 - (Make them look good)



What Prime Consultants Expect

■ After the Bid

– *If you lose:*

- Follow up
- Request a Debrief – What could we have done better?
- Stay in contact with the prime consultant for the next opportunity.

– *If you win:*

- Get subcontract and be prepared to sign
- Forward Insurance Certificate Immediately
- Ask for project kick-off meeting
 - *Review expectations*
 - *Deliverables*



What Prime Consultants Expect

■ After the Bid (cont.)

— *Subcontract*

- *Paid when paid provision?*
- *Insurance – is your coverage sufficient; did you cover the cost in your proposal?*
- *Termination provisions?*
- *Method for adding compensation/additional services?*
- *Duration of services? Schedule?*
- *Deliverables.*
- *Fee structure: lump sum, GMP, cost plus fixed fee*
- *Fee schedule*



What Prime Consultants Expect

- **After the Bid (cont.)**

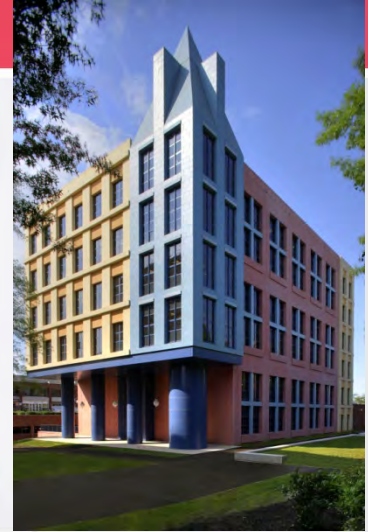
- *Billing*

- *What is required on the invoice?*
 - *How should it be formatted?*
 - *What is the client's billing schedule?*
 - *What is the prime's schedule to receive and send the invoice?*
 - *How long does it take for the prime to process payment and send payment?*



What Prime Consultants Expect

Questions





Thank You!

