

Professional Development Skills Mini-training

Session 33

October 28, 2008
3:00 – 5:00 p.m.



WilburSmith
ASSOCIATES

Baker

Speakers / Panelists

A. Taking the Mystery out of the Selection Process

- Michael Kubek, Ohio DOT District 12

B. Kickoff Meetings

- Steve Wilson, Michael Baker Jr.

C. How to Make a Winning Presentation

- Suzann Rhodes, Wilbur Smith

D. Making Your Project Successful

- Ralph Trepal, Wilbur Smith

E. Panel Discussion

- Lloyd MacAdam, Ohio DOT District 11
- Lyle Flower, Ohio DOT Contracts



WilburSmith
ASSOCIATES

Baker

Taking the Mystery out of the Selection Process

Michael Kubek, Ohio DOT District 12



WilburSmith
ASSOCIATES

Baker

Taking the Mystery Out of the Selection Process



Michael J. Kubek, P.E.

Ohio Department of Transportation
District 12 - Production Administrator

ODOT Consultant Contracts

- ODOT's primary need for obtaining consultant services
 - Supplement ODOT staff to meet program demands
 - Subject experts

ODOT Consultant Contracts

- Primary Goal
 - The consultant will serve and function as an extension of the ODOT staff



Consultant Selection Process

- ODOT posts Programmatic
- Consultant submits electronic Letter Of Interest (LOI)
- District Selection Committee reviews LOI packages, creates a short list of 4-6 consultants, and completes scoring for all criteria except “Current Workload”
- A team of Central Office and District staff complete the scoring
- Selection is posted on the web

Consultant Services Web Page

The image shows a screenshot of a Microsoft Internet Explorer browser window displaying the Ohio Department of Transportation (ODOT) website. The browser's address bar shows the URL: <http://www.dot.state.oh.us/Divisions/ProdMgt/Consultant/Pages/default.aspx>. The page features a navigation menu with links for Home, Districts, Divisions, ODOT A-Z, Services, and Contacts. A search bar labeled "Search ODOT" is located in the top right corner. The main content area is titled "Office of Consultant Services" and includes a breadcrumb trail: "ODOT Home > Divisions > Production Management > Consultant Services".

Office of Consultant Services

General Information

- Announcements**
Notices to Consultants
- Average Overhead Rates for Net Fee Calculation**
- Consultant Evaluation System (10/25/2007) Ratings**
- Electronic Invoicing Newsletter**
- Policies and Procedures**
- Travel Regulations Information**
- Wage Rate Survey Results, April 2005**
- Procedures for LRFD Bridge Design Questions**
- Consultant Audit Circulars**
- Consultant OAKS Numbers**

ODOT Postings and Selection History

- ODOT Postings**
 - Programmatic Consultant Selection Group No. 08-11-08, Scope of Services**
 - Instructions for Submitting an Electronic Letter of Interest**
 - Letter of Interest Templates**
 - Submit an Electronic Letter of Interest**
 - Previous Consultant Selections**

Left Sidebar Navigation:

- Aerial Engineering/Survey
- Consultant Services
 - Contacts
- Geotechnical Engineering
- Production
- Real Estate
- Roadway Engineering

Consultant Selection Criteria

CATEGORY	VALUE
Project Manager	10
Strength/Experience of Staff	25
Cost Containment	10
Firm's Current Workload /Availability of Personnel	10
Past Performance	30
Project Approach	15
Total	100



Consultant Selection Criteria

- Project Manager (10 points)
 - Match the skills of your project manager with the primary need of the project.
 - Communication skills are vital
 - Good contract management
 - Remember who the client is



Consultant Selection Criteria

- Strength/experience of staff (25 points)
 - Foundation of the proposal
 - All other criteria must be backed up by the firm's ability to deliver a quality product
 - Teaming can work for or against you depending on the project
 - Recommend listing years of experience and give examples of experience on similar projects



Consultant Selection Criteria

- Cost containment (10 points)
 - Define how costs will be contained throughout the project life
 - Firm overhead rate
 - Working within the contract
 - Internal processes that add to efficiencies
 - Good design upfront (value engineering)
 - Design that reduces construction costs



Consultant Selection Criteria

- Firm's current workload and availability of personnel (10 points)
 - Not scored or taken into consideration by the District Selection Committee
 - A team of Central Office staff and the District Deputy Directors take this criteria into consideration on a statewide level



Consultant Selection Criteria

- Past performance (30 points)
 - Scores in the Consultant Evaluation System (CES) are the primary driver
 - Greater emphasis is placed on CES scores for projects that are similar to the posted project
 - State the action you have taken or plan to take in order to rectify a poor rating in the system
 - Provide references for past experience on similar projects with other agencies (non-ODOT)



Consultant Selection Criteria

- Project Approach (15 points)
 - Often can make or break a selection
 - Convey your interest in the project
 - How will the project benefit from your involvement?
 - Show a clear understanding of the project without repeating the scope verbatim!
 - Be innovative, but maintain flexibility



Letter of Interest Documents

CATEGORY	VALUE
Project Manager	10
Strength/Experience of Staff	25
Cost Containment	10
Firm's Current Workload /Availability of Personnel	10
Past Performance	30
Project Approach	15
Total	100



- u Cost containment and general qualifications
- u Key staff and project approach

Letter of Interest Submission

- Cost containment and general qualifications
 - Typically 7 page limit
 - One document for all projects (general)
- Key staff and project approach
 - Typically a 2 page limit (as specified)
 - One document per project (project specific)
- Resumes of Key Personnel
 - Upon request



Cost Containment and General Qualifications

- Overhead rate
- Internal processes for cost controls
- Emphasize local knowledge
 - Number of employees and skill set
- Brief resume of key personnel
 - Emphasize years of experience
- Project experiences



Key Staff & Project Approach

- Address all 6 scoring criteria
 - Emphasize the criteria that you feel gives you the competitive advantage, but do not neglect the other 5 categories
- Make note of the selection sub-factors
 - Gives insight to uniqueness of the project and/or what aspect of the project is of significant concern to ODOT
- Don't name drop
 - Define key personnel and how their specific role will benefit the project
- Give project specific cost containment methods



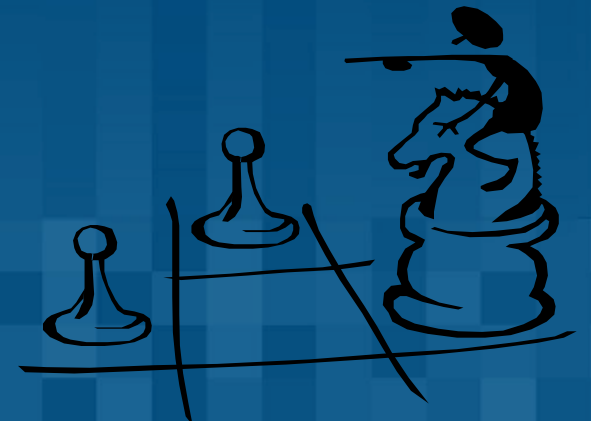
LOI Submission Strategy

- Provide all requested information to avoid disqualification
 - Compliance items
 - Political contributions
 - Unresolved findings for recovery
 - Offshore labor
 - Meet qualifications
 - Pre-qualifications for you and subconsultants
 - DBE/EDGE
 - Use templates with proper format
 - Submit by the deadline



LOI Submission Strategy

- Briefly cover all selection criteria, but emphasize the one that sets your firm apart from all other firms for this particular project
- Give ODOT the confidence that the project will be in good hands
- Be able to back up all of what you state in the LOI



Goal and Optimum Outcome

If you successfully convey that you are the best and most qualified consultant for the project, then you, ODOT, and the taxpayers all win!



Questions



WilburSmith
ASSOCIATES

Baker

Kickoff Meetings

Steve Wilson, Michael Baker Jr.



WilburSmith
ASSOCIATES

Baker

Project Kickoff Meetings



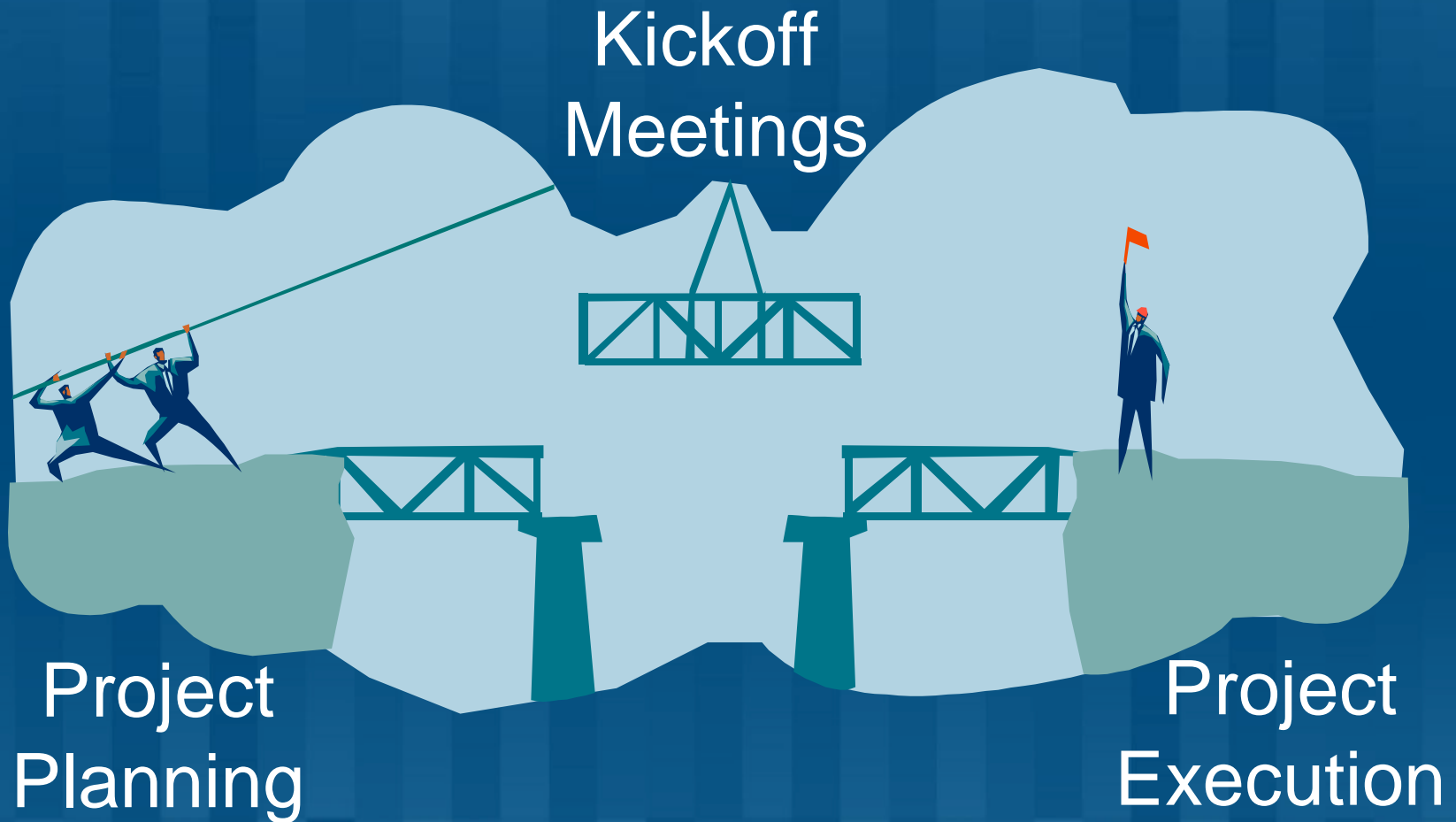
- Why?
- Who?
- How?
- What?

Project Kickoff Meetings



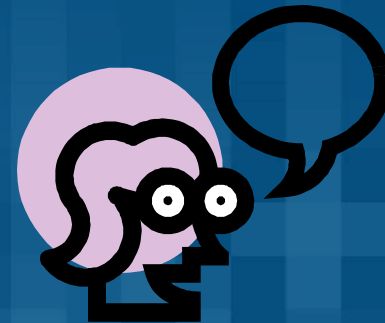
- **Why?**
- **Who?**
- **How?**
- **What?**

Bridging the Gap



I didn't know that...

- ...I was allowed to talk directly to the client
- ...CADD files were part of the deliverables
- ...the Mayor was pushing this project
- ...item was in the scope of work
- ...a new invoicing procedure was required
- ...Joe was assigned to this project



Goals of the Kickoff Meeting

- Team building
- Clarify scope
- Clarify roles and responsibilities
- Further defines or clarifies client and internal expectations
- Communicate the project plan
- Gets everyone on the same page



Project Kickoff Meetings



- Why?
- **Who?**
- How?
- What?

Participants

- Internal vs. External
- Client
- Subs
- Task managers
- Administrative

Project Kickoff Meetings



- Why?
- Who?
- **How?**
- What?

Making Kickoff Meetings a Success

- Preparation
 - Distribute agenda in advance
 - Distribute the scope

Making Kickoff Meetings a Success

- Advance considerations
 - Size and complexity of the project
 - Previous experience with the client or consultant
 - Previous experience with the project team
 - Did the team develop the scope?
 - Scale the meeting accordingly

Making Kickoff Meetings a Success

- Running the meeting
 - Start on time
 - Keep track of action items
 - Follow up on action items
 - Go “topless” (Ban laptops and Blackberries)
 - Refreshments



Project Kickoff Meetings



- Why?
- Who?
- How?
- **What?**

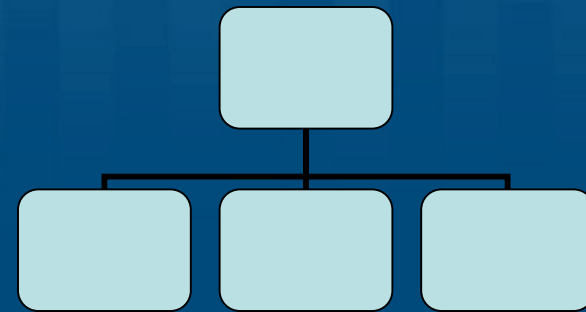
The Agenda

Remember – Scale accordingly!



The Agenda

- Team Introduction and Organization
 - Organization Chart
 - Contacts list



Name	Project Role	Organization	Phone	E-mail
<i>M. Kubek</i>	<i>PM</i>	<i>ODOT</i>		
<i>S. Wilson</i>	<i>PM</i>	<i>Baker</i>		
<i>A. Smith</i>	<i>Proj. Engr</i>	<i>Baker</i>		

The Agenda

- Team Introduction and Organization
- Project Overview
 - Objectives and goals
 - Critical constraints
 - Critical assumptions
 - Critical Success Factors

The Agenda

- Team Introduction and Organization
- Project Overview
- Administrative
 - Contract terms
 - Invoicing requirements
 - Invoicing schedule
 - Status reporting

The Agenda

- Team Introduction and Organization
- Project Overview
- Administrative
- Scope and Deliverables
 - Overview
 - Clarifications
 - Electronic deliverables
 - CADD requirements
 - Outstanding information

The Agenda

- Team Introduction and Organization
- Project Overview
- Administrative
- Scope and Deliverables
- Schedule
 - Key milestones
 - Reporting
 - Float

The Agenda

- Team Introduction and Organization
- Project Overview
- Administrative
- Scope and Deliverables
- Schedule
- Budget

The Agenda

- Team Introduction and Organization
- Project Overview
- Administrative
- Scope and Deliverables
- Schedule
- Budget
- Project Management Plan

Project Management Plan

- Communication plan
- Document management
 - Project websites
- Quality management
- Risk assessment/risk management
 - Identification
 - Probability
 - Impact
- Roles and responsibilities

RACI Matrix

- R – Responsible
- A – Accountable
- C – Consult
- I – Inform

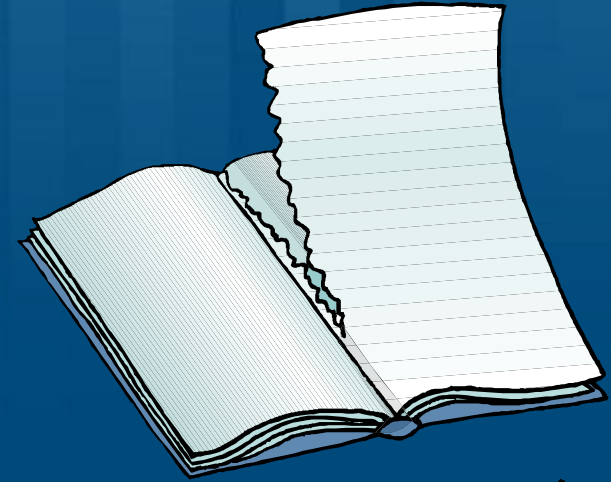
Task	Project Manager	Structural Task Mgr	Hwy Task Mgr	Traffic Task Mgr
TS&L	A	R	C	I
Typical Sect.	A	I	R	C
Signing Plan	A	C	C	R

The Agenda Checklist

- Team Introduction and Organization
- Project Overview
- Administrative
- Scope and Deliverables
- Schedule
- Budget
- Project Management Plan



In Summary, Kickoff Meetings...



Questions



WilburSmith
ASSOCIATES

Baker

How to Make a Winning Presentation

Suzann Rhodes, Wilbur Smith



WilburSmith
ASSOCIATES

Baker

Today's Presentation

Rules of Thumb

Guidelines for successful communication

– Verbal

- (face to face; informal meeting; presentation)

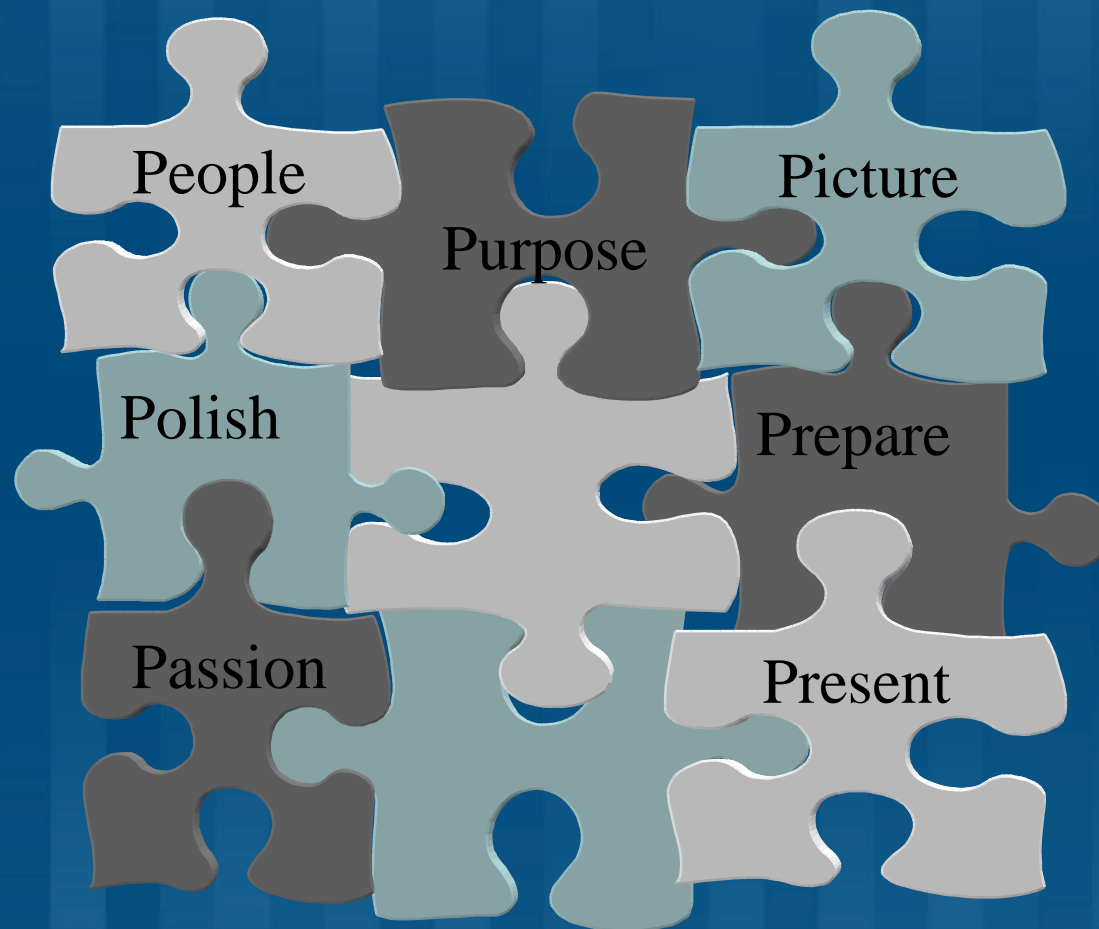
– Written

- (simple reports, letters)

Today's Presentation

- What and how
 - Not when
 - Not why
 - Not what would prompt

The “P” Principles



People - know your audience



- What do they already know
 - Clients, potential clients, peers
 - Age, background, profession
- What do they want to know
 - Why are they receiving the information
 - Why are they in the audience

Purpose – know what you want to achieve

- What is your message
- What is THE POINT (limit 3-5)
 - Is it S-M-A-R-T
 - Specific
 - Measurable
 - Actionable
 - Realistic
 - Time-bound



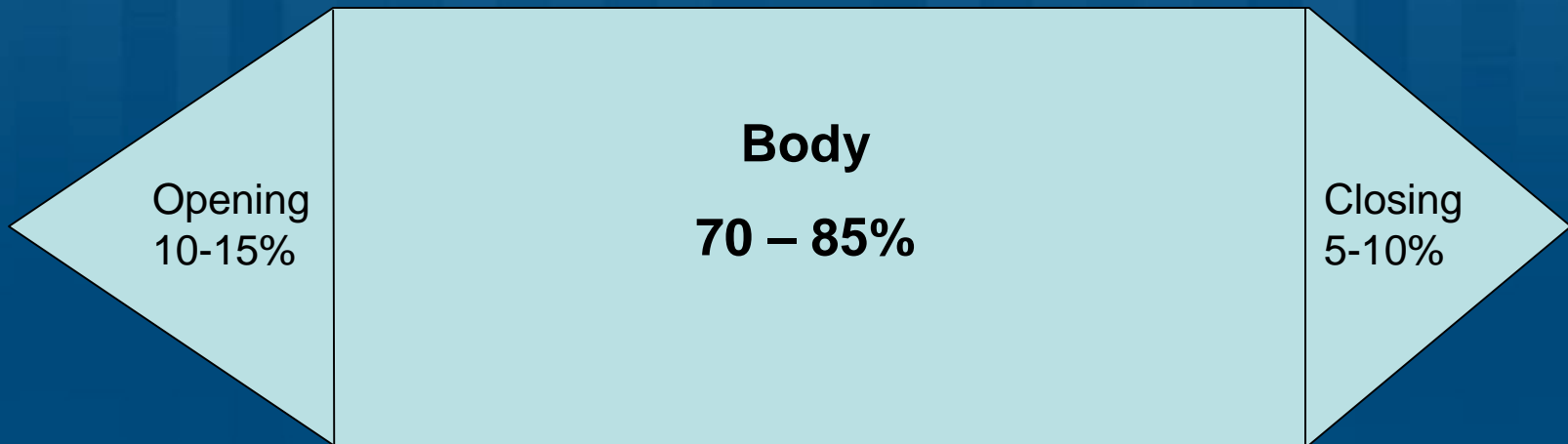


Format

- Attention grabbing introduction
- Clear concise orderly middle
 - Tell them what you are going to tell them
 - Tell it to them
 - Tell them what you told them
- Powerful conclusion



Format



Opening
10-15%

Body
70 - 85%

Closing
5-10%

Get attention

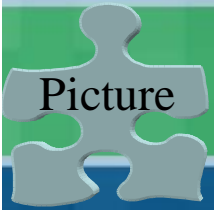
Convince/Inform

Tell action

Examples - Opening

- Explicit need or problem of the audience
- Rhetorical question
- Anecdote (humorous, personal)
- Praise
- Proactive statement or action
- Quotation
- Statistic
- Show something





Picture – illustrate your points

- Examples
- Charts
- Graphs
- Statistics
- Quotes
- Photos
- Models





Polish

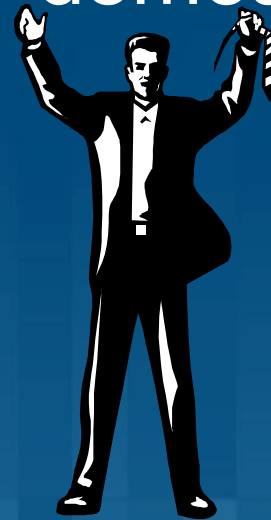
- Delivery skills – avoid distracting habits
 - Posture
 - movements, gestures,
 - voice rate and tone, inflection,
 - Don't be arrogant, be friendly
- Can anyone give an example?





Passion

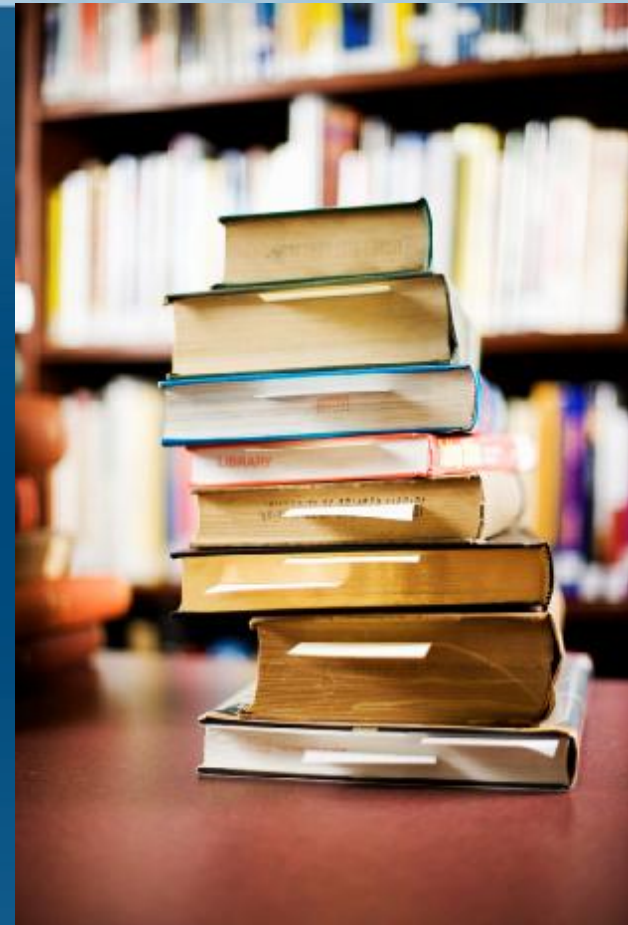
- They will forget what you say
- They will remember your stories
- They will remember your demeanor
 - Be enthusiastic
 - Demonstrate knowledge





Prepare

- Do research
- Practice
- Independent review



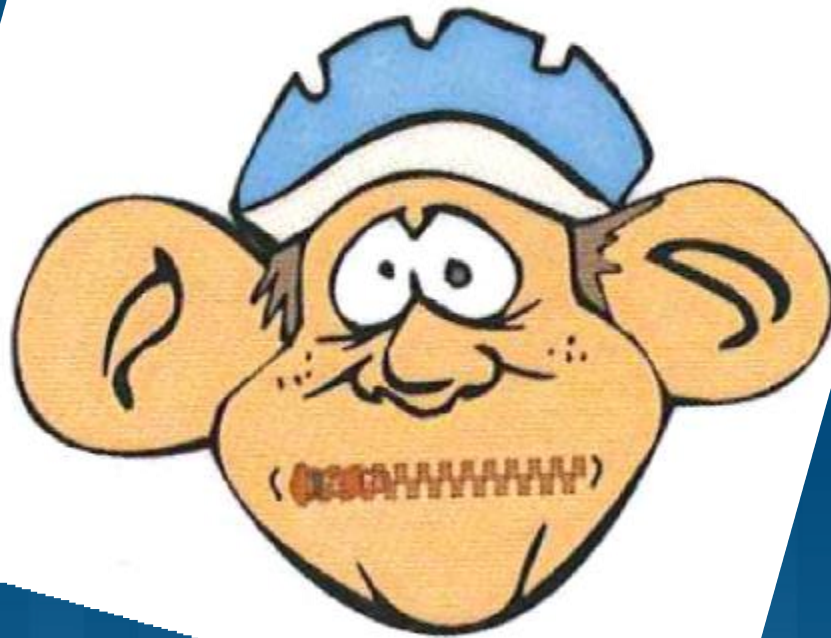


Present

- If speaking
 - Observe reactions
 - Adjust
 - TTT (touch, turn, talk)
- If written
 - Edit
 - QA/QC



Remember to listen



Answer Questions

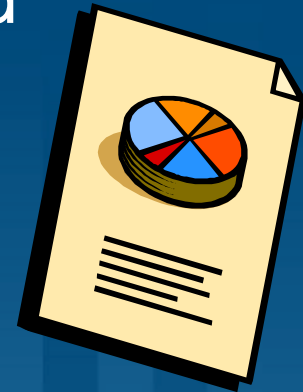
- Repeat the question
- Respond with one line
- Elaborate
- Repeat the one line summary
- Repeat question and
 - Verify that you answered it

NHI presentation standards

- Power point slides
 - 7 words per line
 - 7 lines per slide
 - No gratuitous graphics
- Presentation
 - Audience interaction (7 minutes)

Misc.

- Written skills
 - Keep it organized (numbered, bullets, etc.)
 - Visual examples (tables, graphs, charts)
 - Proofread, proofread, proofread

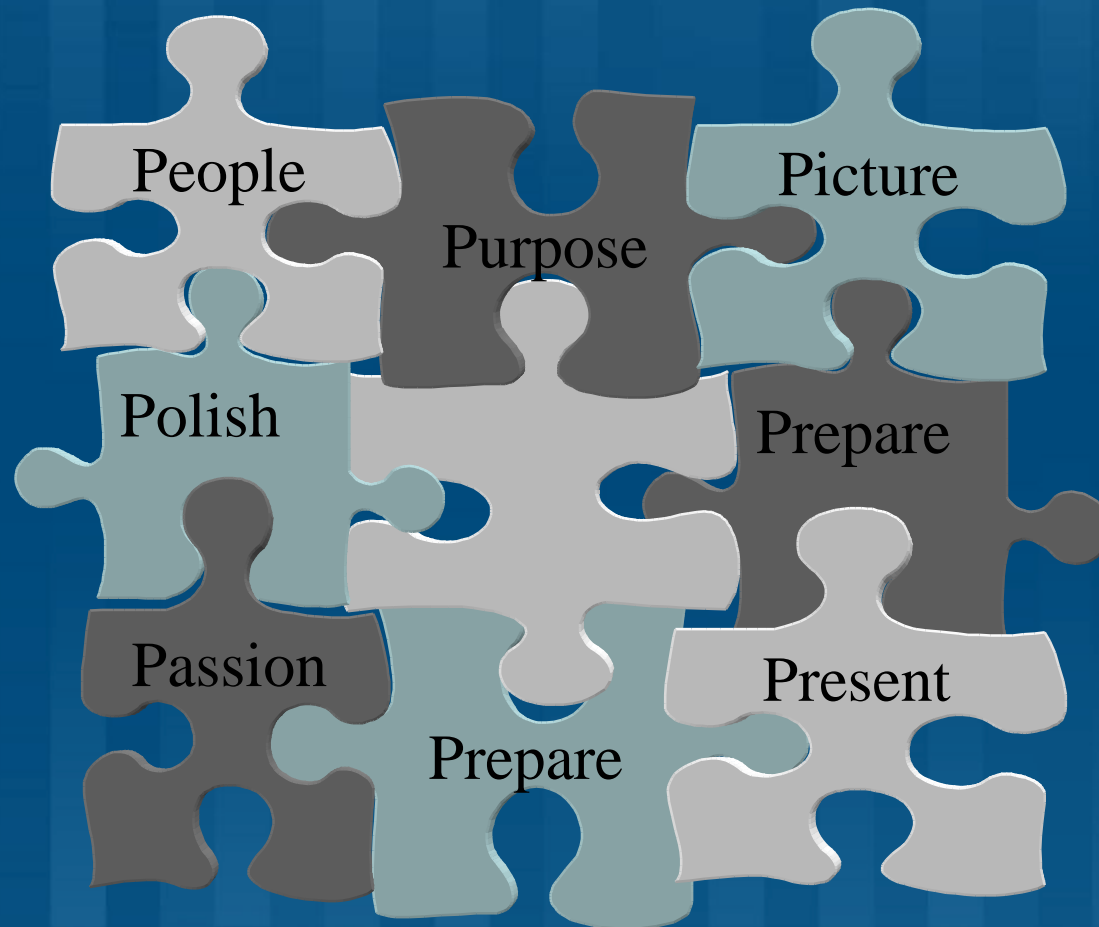


What will set you apart

- Great opening
- Great visual aids
- Practice



The “P” Principles - Summary



Questions



WilburSmith
ASSOCIATES

Baker

Making Your Project Successful

Ralph Trepal, Wilbur Smith



WilburSmith
ASSOCIATES

Baker

Project Vision Statement

- Deliver a quality project on time
- Meet your budget
- Make your client happy
- Win more work

Today's Situation

- You're ready to start
 - You're the project or task manager
 - The contract is signed
 - You have a notice to proceed

Today's Situation

- Your client and your company
 - Have placed their trust in you
 - You're excited to get going
- But which way?

But which way?

Alice: Would you tell me, please, which way I ought to go from here?

Cheshire Cat: That depends a good deal on where you want to get to.

Alice: I don't much care where--

Cheshire Cat: Then it doesn't matter which way you go.

Alice: --so long as I get *somewhere*.

Cheshire Cat: Oh, you're sure to do that if you only walk long enough.



So before you start...

- Know where you want to go
- Consider obstacles:
 - The leading causes for lack of success
 - Does your project have some of these?

Obstacles to Project Success

- Undefined schedule?
 - Tasks on a CPM schedule
 - Milestones for intermediate completion
 - Include potential for
 - External delay
 - Approvals
 - Public notices

Obstacles to Project Success

Know the Scope

- Did you prepare the proposal and estimate?
- Is the work scope clear?
 - Vision of the product
 - Steps to get you to the end

More Obstacles

- Have you ever done one of these before?
 - Type
 - Size
 - Complexity
- Are you familiar with the client?
 - Individual
 - Organization

More Obstacles

Tools and Technology

- Is your team familiar with the tools and technology?
- Subconsultants:
 - Are you familiar with them?
 - Do you understand what they have to do?

An Attitude for Project Success

- You're not alone
- Everyone wants you to be successful
- Reach out to:
 - Your client
 - Your company
 - Your project team

An Attitude for Project Success

- Don't put off dealing with problems
 - Unlike wine, problems don't improve with age.
 - Old Turkish Proverb: "You're never too far down the wrong road to turn around."

Steps to Project Success: The Basics

- Don't let yourself be sidetracked thinking that the basics can be overlooked
 - Scope, schedule, budget
 - Client progress meetings
 - Team progress meetings

Steps to Project Success: The Basics

- Quality is free
 - Know the requirements
 - Have a process
 - Audit the work
- The cost of poor quality
Is high



Steps to Project Success: Organization

- As the PM or Task Leader
 - Maintain your responsibility to control your work.
 - Effective organizational responsibility

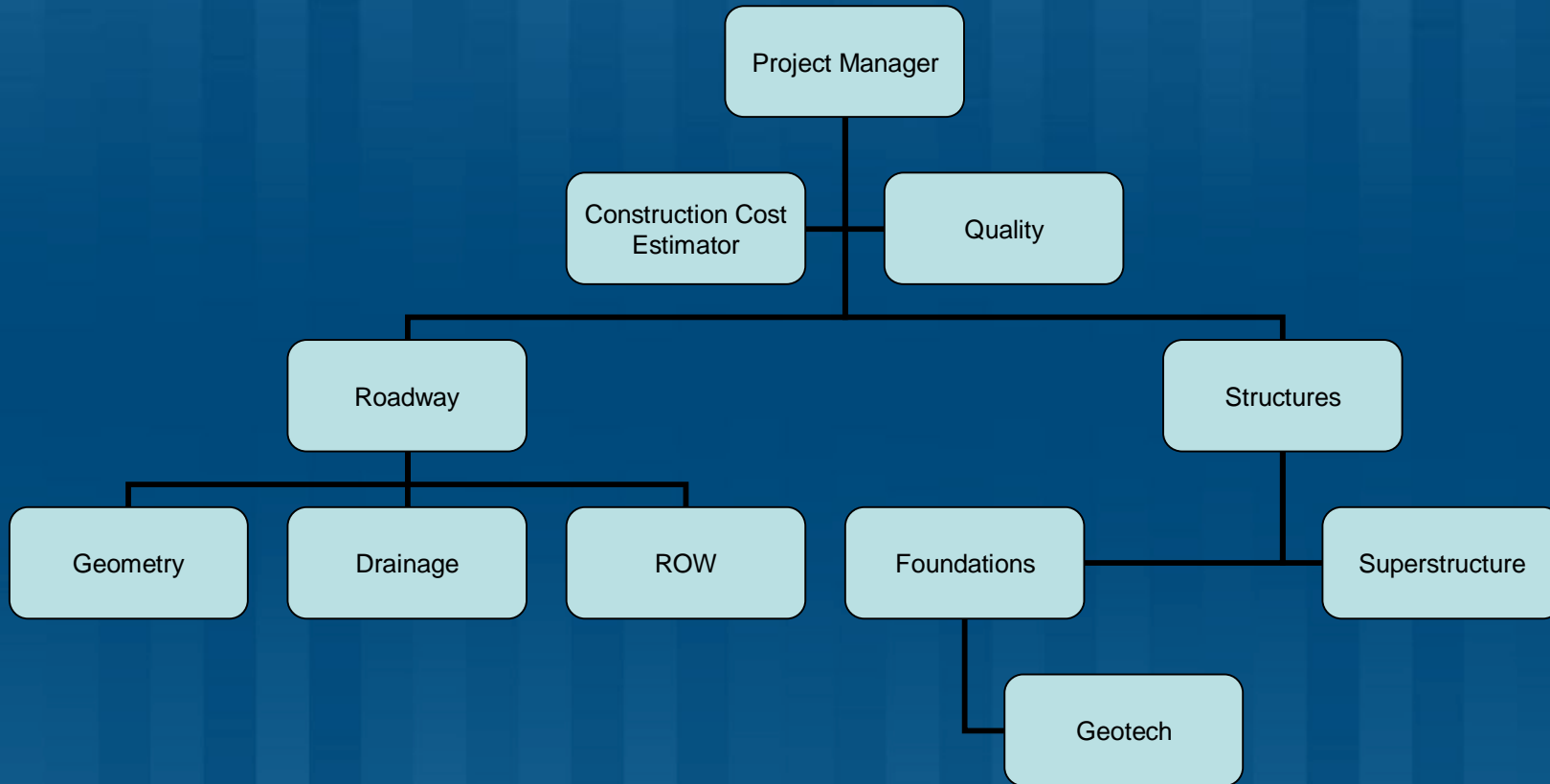


Steps to Project Success: Organization

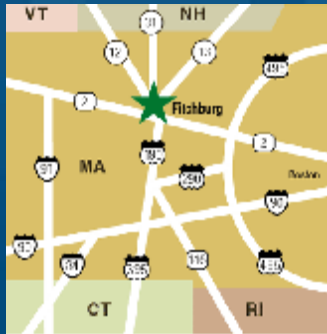
- Effective organizational responsibility
 - Require solid lines on the organization chart
 - Key project issues drive the project organization
 - Demonstrate simplicity and efficiency



Organization Key Issues and Efficiency



Wrap up



Consider the Obstacles



Reach Out



Stick with the Basics

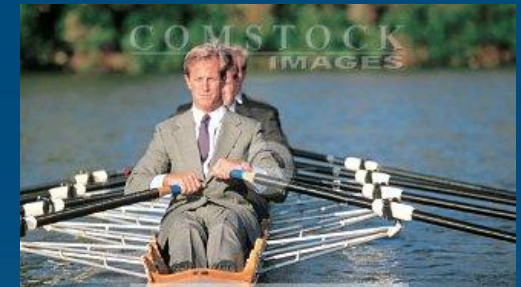
Which Way to Go?



Quality is Free



Control your Work



Effective Organization

Questions



WilburSmith
ASSOCIATES

Baker

Speakers / Panelists

A. Taking the Mystery out of the Selection Process

- Michael Kubek, Ohio DOT District 12

B. Kickoff Meetings

- Steve Wilson, Michael Baker Jr.

C. How to Make a Winning Presentation

- Suzann Rhodes, Wilbur Smith

D. Making Your Project Successful

- Ralph Trepal, Wilbur Smith

E. Panel Discussion

- Lloyd MacAdam, D-11; Lyle Flower, ODOT Contracts



WilburSmith
ASSOCIATES

Baker