Why does ODOT chose DB?

- Innovation
- Cost Savings
- Risk Transfer
- Risk Appropriation
- Speed
Purpose for QBS / Value-Based Selection

• Over 90% of DB use Low Bid

But at times.... just a bid isn’t enough.
Purpose for QBS / Value-Based Selection

• Most Qualified Required
• Ensures commitments
• Allows further innovation (ATCs)
General Steps in QBS / VBDB Selection

Three Primary Phases

• Shortlisting – RFQ / SOQ
• Proposal Development
  • ATC
  • Meetings / Discussions
  • Technical Proposal
• Award
Quality Based Selection / Value-Based Selection

What it isn’t...
• A Beauty Contest
• Random
• Directed by 1 Person
Quality Based Selection / Value Based Scoring
Stage 1

• Request for Qualifications
  • Draft Scope and Conceptual Documents
  • Selection Criteria - General
    • Project understanding
    • Key DB Project team members
    • Proposer’s capabilities
Statement of Qualifications

• Limited
• Organized
• Defined
• Targeted
SOQ Submittal Review – Check in

• Pass/Fail Review
• General formatting
• Timeframe
• Verification of Commitments – DBE/Personnel/EEO
SOQ Submittal Review

• Individual Review
  • Limits predisposition
  • Controls Integrity

• Validation of Info
SOQ Scoring Groups (Typical)

Tech Level Team (5-9 persons)

• Central Office
  • Construction Management Rep
  • Engineering Rep
• District
  • Project Manager
  • Construction Rep
  • P&E Rep
• No Sun for Days......

Executive Level

• Chief Engineer
• District Deputy Director
• Deputy Director of Construction
• Deputy Director of Engineering
• Deputy Director of ODI
• Deputy Director of Operations

Final Decision
SOQ Review manager

Primary Role...
• Record Keeping
• Project Consistency
• Security / Confidentiality
• “Devil’s Advocate”

Most Important.....
Quality Based Selection / Value Based Scoring

RFQ – Scored ranked against each other
- Requested information as used for comparison
- Constant verification back to requested

**Consensus Scoring**
SOQ Scoring Criteria Breakdown

• “All the marbles”... per section to best ranked within section
• Others are ranked with scores compared to highest
• Highest overall ranked is the total of the commensurate scores
And there are some

BIG & DEEP

CONVERSATIONS
Why No More Than 3 ?????

It’s a good number....

It’s per ORC §5517.011 {kinda...}

“The director may provide compensation for preparation of a responsive preliminary design concept to not more than two bidders who, after the successful bidder, submitted the next best bids.”
Shifting Gears

RFP & Technical Proposal
Quality Based Selection / Value Based Scoring

• Stage 2- Request for Proposals & Proposal Development

No longer scoring against each other...
    Scoring against only what is requested.
“Typical Topics”

• Design Management
• Proposed Design
• Construction Management
• Construction
• Quality Management
• Outreach to DBEs and OJT
## General Scoring Ranges

<table>
<thead>
<tr>
<th>General Criteria</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Significantly exceed the RFP</strong></td>
<td></td>
</tr>
<tr>
<td>Many Strengths / No Weakness</td>
<td>90-100</td>
</tr>
<tr>
<td><strong>Exceeds the RFP</strong></td>
<td></td>
</tr>
<tr>
<td>Many Strengths w/ Little Weakness</td>
<td>80-90</td>
</tr>
<tr>
<td><strong>Meets</strong></td>
<td></td>
</tr>
<tr>
<td># Strengths = # Weakness</td>
<td>70-80</td>
</tr>
<tr>
<td><strong>Marginal</strong></td>
<td></td>
</tr>
<tr>
<td>Weakness. Limited/No Strengths</td>
<td>60-70 (minimum of 70)</td>
</tr>
<tr>
<td><strong>Fails</strong></td>
<td></td>
</tr>
<tr>
<td>Weakness considerably exceed</td>
<td>Below 60</td>
</tr>
</tbody>
</table>
Technical Proposal Evaluation

• Can only evaluate and compared to what was requested
• Can only compare to the Scoring Criteria

“If we missed something...can we still consider it?”
Technical Proposal Evaluation – Focus Points

• Objective evaluations
  • Proposer debriefs
• Only Important Items up for evaluation
• Itemize and document commitments above standards process
Technical Proposal Evaluation “Hot Buttons”

• Non-committal statements will not increase scoring
• Place information in proposal if you want it to be known
• Organize proposal per the selection criteria sections
We Document Document Document.....

X 4 the Dickens out of it!
<table>
<thead>
<tr>
<th>Evaluation Criteria</th>
<th>Maximum Points</th>
<th>Score</th>
<th>Points by Component</th>
<th>Score</th>
<th>Points by Component</th>
<th>Score</th>
<th>Points by Component</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Part 2 Project Management</td>
<td>20.00</td>
<td>86.0%</td>
<td>17.20</td>
<td>78.0%</td>
<td>15.60</td>
<td>84.0%</td>
<td>16.80</td>
<td></td>
</tr>
<tr>
<td>Part 3 Sustainability and Green initiatives</td>
<td>5.00</td>
<td>81.0%</td>
<td>4.05</td>
<td>87.0%</td>
<td>4.35</td>
<td>89.0%</td>
<td>4.45</td>
<td></td>
</tr>
<tr>
<td>Part 4 Quality Management</td>
<td>25.00</td>
<td>83.0%</td>
<td>20.75</td>
<td>77.0%</td>
<td>19.25</td>
<td>78.0%</td>
<td>19.50</td>
<td></td>
</tr>
<tr>
<td>Part 5 Proposed Design</td>
<td>20.00</td>
<td>82.0%</td>
<td>16.40</td>
<td>77.0%</td>
<td>15.40</td>
<td>81.0%</td>
<td>16.20</td>
<td></td>
</tr>
<tr>
<td>Part 6 Construction</td>
<td>15.00</td>
<td>84.0%</td>
<td>12.60</td>
<td>81.0%</td>
<td>12.15</td>
<td>88.0%</td>
<td>13.20</td>
<td></td>
</tr>
<tr>
<td>Part 7 Community Relations</td>
<td>10.00</td>
<td>71.0%</td>
<td>7.10</td>
<td>73.0%</td>
<td>7.30</td>
<td>89.0%</td>
<td>8.90</td>
<td></td>
</tr>
<tr>
<td>Part 8 DBE/OJT</td>
<td>5.00</td>
<td>87.0%</td>
<td>4.35</td>
<td>82.0%</td>
<td>4.10</td>
<td>90.0%</td>
<td>4.50</td>
<td></td>
</tr>
<tr>
<td>TOTAL</td>
<td>100.00</td>
<td></td>
<td>82.45</td>
<td></td>
<td>78.15</td>
<td></td>
<td>83.55</td>
<td></td>
</tr>
</tbody>
</table>
Award

- ODOT holds onto the numbers.....

Apparent Best Value Offeror = Highest Score

Score = \[ \text{Proposal Weight} \times \left( \frac{\text{Offeror Score}}{100} \right) \] + \[ \text{Price Weight} \times \left( \frac{\text{Lowest $}}{\text{Offeror $}} \right) \]

Proposal ≈ 20 to 40%  
Price Weight ≈ 80% to 60%
Award

- ODOT holds onto the numbers...

Apparent Best Value Offeror = Highest Score

Score = Proposal Weight \times \left( \frac{Offeror \ Score}{100} \right) + \left[ Price \ Weight \times \left( \frac{Lowest \ $}{Offeror \ $} \right) \right]

Proposal ≈ 20 to 40%  
Price Weight ≈ 80% to 60%

PER DBIA..... ≠ “Best Value”
Alternative Technical Concepts

• Cost not considered in evaluation
• “Equal or Better” consideration done in terms of Performance
  • Risk of Long Term Considered
  • Not always the same
Alternative Technical Concepts

• Confidential “One-on-One” meetings
• Official Submittal in writing – official response in writing
• Evaluated by a Core “decision Makers” group
And the “Rules” Change Again
• Low Bid w/ “On-going” tech proposal
  • I-480 Bridge
  • $274 Million Bridge “Add” and rehabilitation
• Prescribed fixes to original structures
Upcoming Variation

• Shortlist
• Meeting #1
  • 3 weeks post RFP
  • Conceptual Bridge Type and Potential Arrangement
  • ATC discussion
• Meeting #2
  • 5 Weeks post RFP
  • Bridge Type and Arrangement
  • ATC discussion
Upcoming Variation

• Meeting #3
  • 7 Weeks post RFP
  • Bridge type, Foundations, Bearings, Joints, Deck
  • ATC discussion

• Technical Proposal
  • Pass / Fail
  • Consistent with Meeting presentations
  • Scope Compliant

Award on Price
What we’ve Learned...

• Size not the only determining factor
  • Complexity / Level of Detail

• ATCs Must
  • No ATCs = Minimal gain for effort
  • ATC meetings invaluable

• Less is more
  • Define only the needed differentiators
  • Only valuable if true differences because of project type
After award....

Info is shared.... if asked
LA FIN
Fine
das Ende
el fin
结束
Το τέλος
Hetay Ndeay
The End