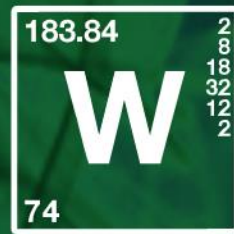


win more
the proposal process



ork

Kathleen Held & Susan Merrigan

02/08/17 • 11:30 am – 12:30 pm



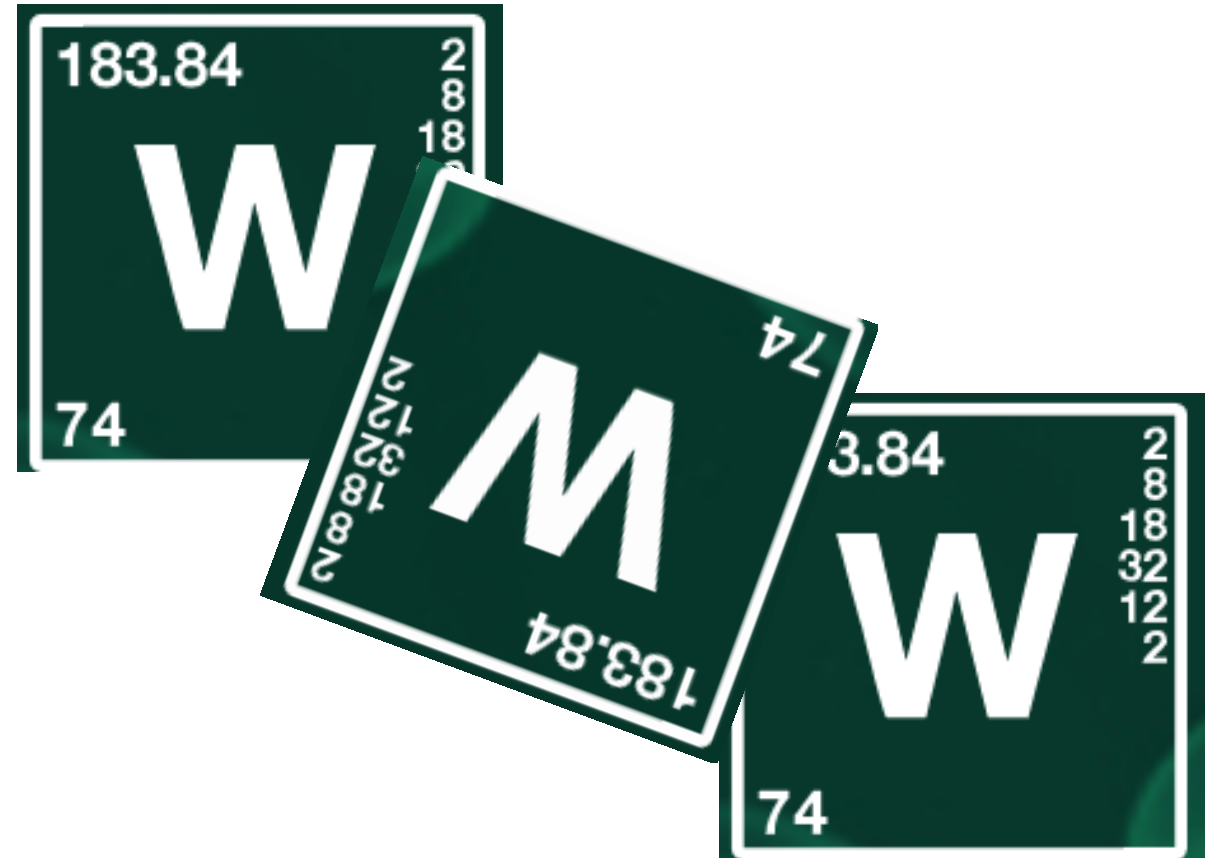
Susan Merrigan, FSMPS, CPSM
Sr. Marketing Manager
Skidmore Owings & Merrill

Kathleen Held, CPSM
Vice President, Marketing & BD
Cini-Little International, Inc.



AGENDA

- Proposal Toolbox
- Proposal Planning Process
- Consultant Selection Process
- Writing & Graphics
- PB&J
- Proposal Response
- Presentation/Interview
- Follow up/Debrief





PROPOSAL TOOLBOX



PROPOSAL TOOLBOX

Brand Guidelines

Templates

Electronic Filing System

CRM Tracking System

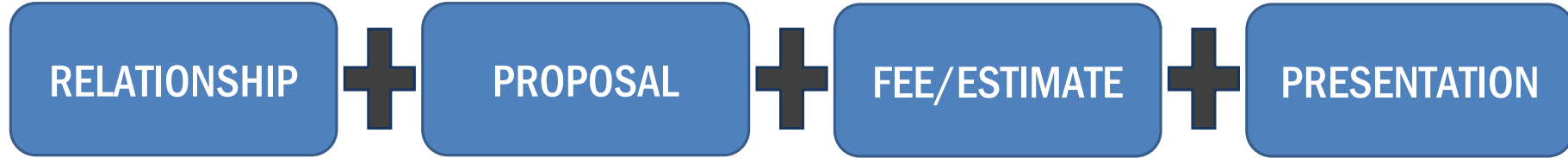




PROPOSAL PLANNING PROCESS



WHY TEAMS WIN



GO/NO-GO PROCESS

Questions you need to ask...

Fee Potential?

Win Probability?

Can you Deliver it?

Quality of Relationship?

Portfolio & Personnel?

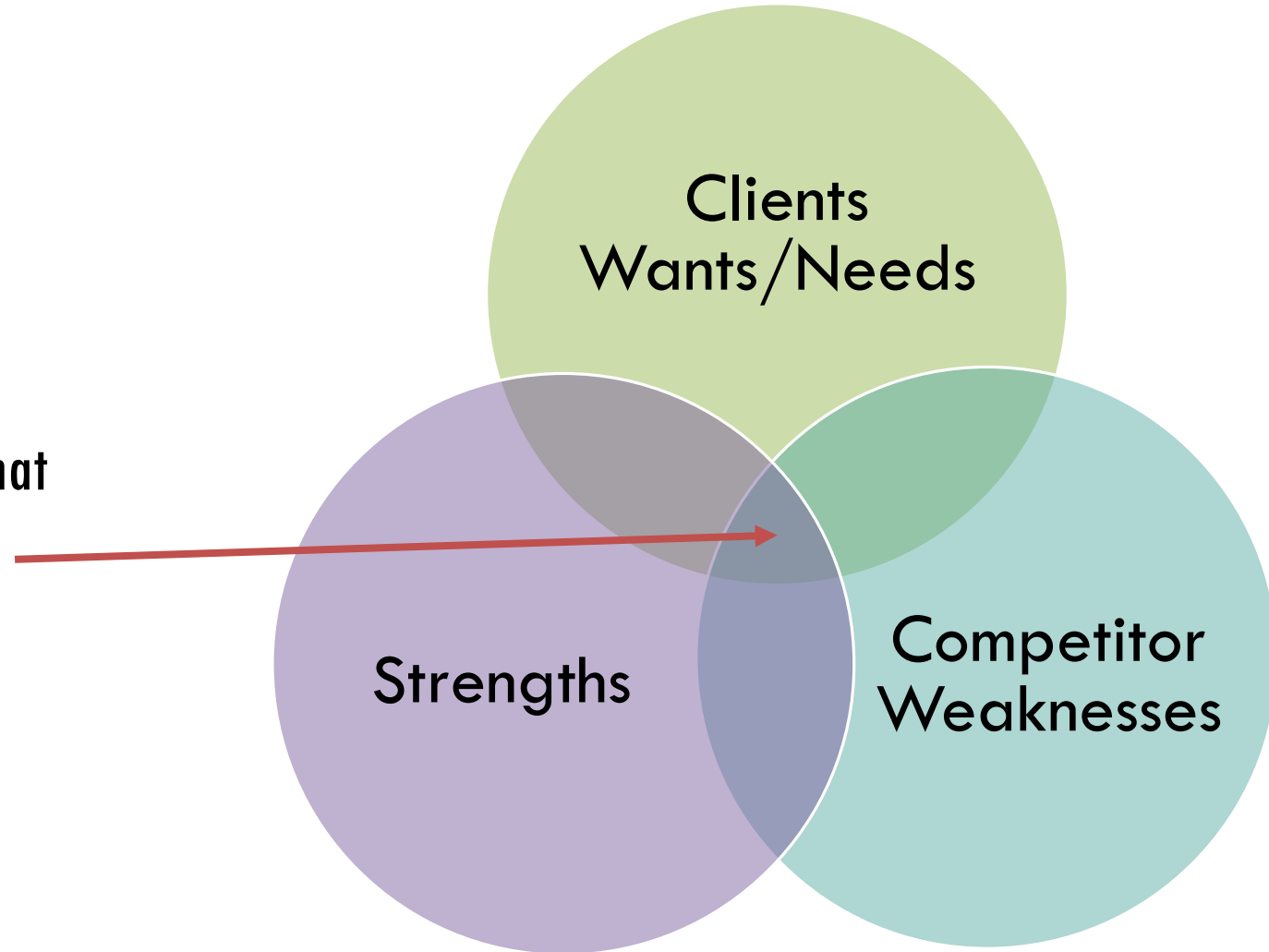
Available Resources?

Repercussions of NOT Submitting?



FINDING THE SWEET SPOT

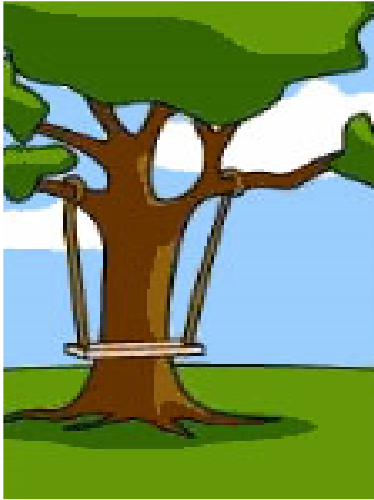
You must find the VALUE that
your competition can't
satisfy to be successful!



KNOW YOUR CLIENT



Client Explanation of Need



How RFP Described Need



Firm Guesses at Client's Need



How Price was Established



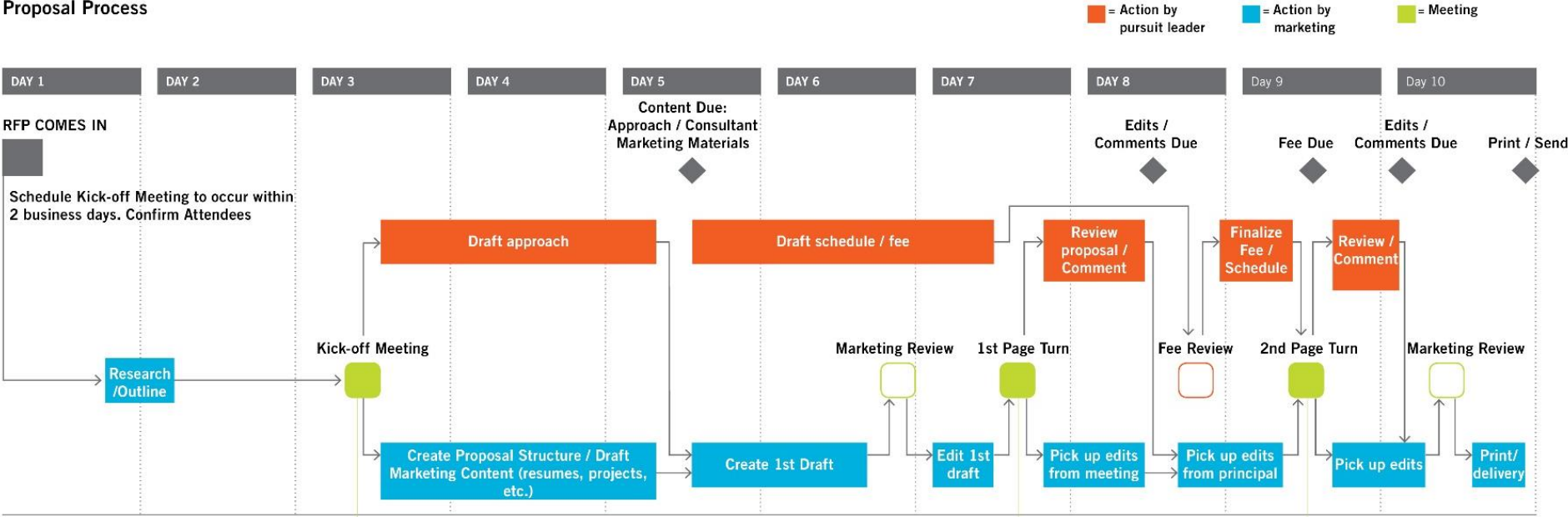
How Proposal was Prepared



What Client Actually Needed

THE PROCESS

Proposal Process



- Client / RFP research**
- Who are decision makers?
 - Who is competition?
 - What is our differentiator?
- Draft outline**
- Be very detailed about what is required
- Project / Team Matrix**
- Pull out program goals / objectives, match up projects and people
 - Ask for marketing huddle if you need help
- Fill out calendar w/ ideal dates for review, content**
- Check principals' calendars when doing this!

- Don't forget:**
1. Set up review meetings
 2. Create calendar appointments for deadlines, meetings
 3. Email updated outline with detailed text requirements
 4. Set up marketing task number
 5. Email marketing number to team
 6. Contact consultants

- Don't forget:**
1. Spell check
 2. Create list of outstanding items / prioritize

- Don't forget:**
1. Email list of to-do's to pursuit team

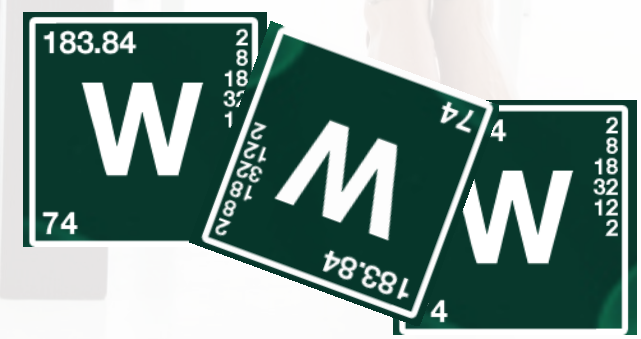
- KICKOFF MEETING**
- 30 minute agenda:
1. Review research / RFP highlights
 2. Review outline w/ proposal requirements
 3. Confirm team, projects, consultants
 4. Assign responsibilities for writing
 5. Confirm proposal schedule

- 1ST PAGE TURN**
- 30 minute agenda:
1. Define what is missing, questions
 2. Review page by page (bring printouts)
 3. Assign specific tasks for completion, review, etc.
 4. Confirm deadline for comments/edits
 5. Confirm next meeting

- 2ND PAGE TURN**
- 30 minute agenda:
1. Define what is missing
 2. Review pages that have been updated since 1st meeting
 3. Give deadline for final comments
 4. Confirm print schedule



CONSULTANT SELECTION



WHAT THEY ARE SEEKING

Relevant Experience with Prime
Experience with Client and Project Type
Matrix to Prime's Selected Projects
Required Labor Categories
Small Business Requirements



WHERE THEY ARE LOOKING

Contacts and Relationships
Refer to Previous Consultant Profiles
Review Database and Spreadsheets
Query Principals and Project Managers
Ask Clients and Contracting Officers
Referrals From Other Consultants
Google and Firm Websites



EVALUATION CRITERIA

Firm Compatibility

Complementary Services and Experience

Market Position and Reputation

Common Core Values

Reciprocal Relationship

Flexibility

Successful Prior Teaming Experiences

View of Past and Current Clients

Financial Stability

Size, Resources, and Technical Capability



QUALITY OF RESPONSE AFFECTS YOUR SELECTION

Responses should be:

- Customized
- Complete
- Timely
- Knowledgeable

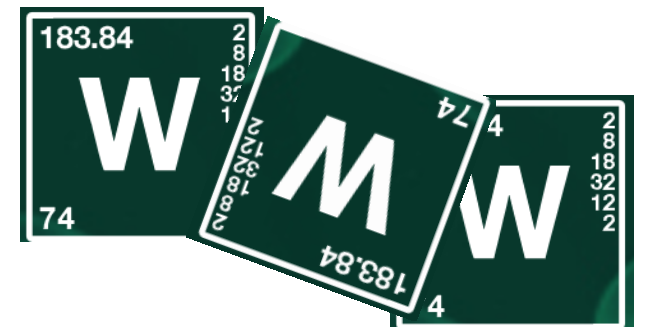
Other key influencers:

- Accessibility and Responsiveness
- Previous Teaming Experience



Tips and tricks

WRITING & GRAPHICS



WRITING AND GRAPHICS

Writing

- Aim for direct, active, friendly writing style
- Make it easy and enjoyable to read
- Use terms your client uses
- Edit for uniformity
- Edit the whole document for style and tone

AMERICAN PUBLIC TRANSPORTATION ASSOCIATION NEW HEADQUARTERS

PROPOSAL FOR INTERIOR ARCHITECTURE AND
MEP ENGINEERING DESIGN SERVICES

JULY 2, 2014



PERKINS+WILL

WRITING AND GRAPHICS

Writing

- Present tense, active verbs
- Eliminate unnecessary words
- Replace complicated words with simpler ones
- Use bulleted items

SPECIALIZED EXPERIENCE + TECHNICAL COMPETENCE /



Confidential International Media Company - Sydney, Australia



US Green Building Council Headquarters - Washington, DC

The firm has completed 18 LEED® CI Platinum projects, 10 of which were designed by teams from our Washington, DC office.

LEED Platinum

Bechtel DC Government Affairs*

Washington, DC
LEED-CI Platinum

The Calgary Public Building

Calgary, AB
LEED-CI Platinum

Confidential International Media Company

Sydney, Australia
Sao Paulo, Brazil
LEED-ID+C Platinum

CoStar Group Headquarters*

Washington, DC
LEED-CI Platinum

CoStar Group Branch Offices*

Atlanta, Georgia
Boston, Massachusetts
San Diego, California
LEED-CI Platinum

Generation Investment Management*

New York, New York
LEED-CI Platinum

Institute for Systems Biology Headquarters

Seattle, Washington
LEED-CI Platinum

Knoll Showroom

Toronto, Ontario
CaGBC Platinum

The Office of Al Gore*

Nashville, Tennessee
LEED-CI Platinum

Perkins+Will Offices

Chicago, Illinois
Seattle, Washington
Washington, DC*
LEED-CI Platinum

U.S. Green Building Council Headquarters*

Washington, DC
LEED-CI Platinum

World Wildlife Fund*

Washington, DC
LEED-CI Platinum

WRITING AND GRAPHICS

Writing

- Avoid Designer Babble

Poor wording: The new business school campus is characterized by a monumental scale incompatible with the context of the surrounding built volumes.

Better wording: The new business school is out of scale with its neighbors.



WRITING AND GRAPHICS

Writing

- **Avoid Designer Babble**
 - **Before:** They are articulating their experiential experience.
 - **After:** They drew on their prior experiences for the design of their new home.
- **Before:** Projects are either investigative or accommodative.
- **After:** Designs either stretch the envelope or echo current practice.



WRITING AND GRAPHICS

Layout

- Illustrate firm's sophistication and professionalism
- Enhance the readability of your text
- Make it easy for the reader to find information
 - Headings and subheadings
 - Boldface, italics
 - Highlighted text
 - Bulleted items

ARCHITECTURAL & ENGINEERING SERVICES:
CANNONDESIGN

CannonDesign's philosophy advocates that the workplace is a catalyst for advancing the entire organization.

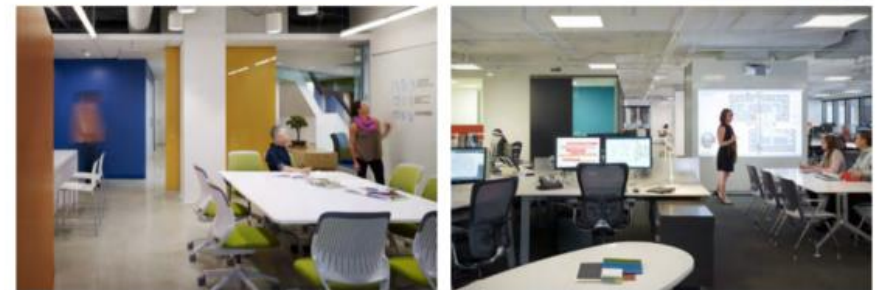
Guided by careful research, the workplaces we design for our clients help shape more efficient work behaviors, resulting in higher productivity. By expressing the aspirations of the company and its people, it strengthens the culture and helps engage employees. By changing the way space is utilized, the workplace could radically alter old assumptions about long-term occupancy costs.

FIRM PROFILE

CannonDesign is an integrated global design firm that unites a diverse team of strategists, planners, architects, engineers, and industry specialists driven by a singular goal – **to solve our clients' and society's greatest challenges**. The firm has experienced substantial growth marked by a widening range of service offerings in architecture, engineering, interior design and project delivery, and the establishment of 17 offices throughout the world.

OFFICE LOCATIONS

CannonDesign has offices in Abu Dhabi, Baltimore, Boston, Buffalo, Chicago, Los Angeles, Montreal, Mumbai, New York, Phoenix, Pittsburgh, St. Louis, San Francisco, Shanghai, Toronto, Vancouver and Washington, D.C.



WRITING AND GRAPHICS

Graphics

- Convey large amount of information in small space
- Choose from:
 - Line charts to show trends
 - Bar charts for comparisons
 - Pie charts showing relationships
 - Tables to present a lot of data
 - Flow charts to show process
 - Photographs

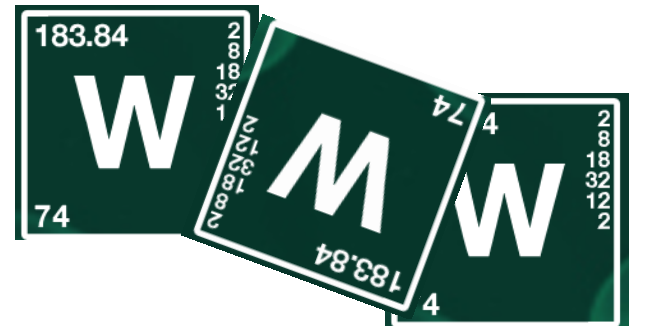
TEAM'S HISTORY OF WORKING TOGETHER

	Laura Morris Managing Principal	Tom Gregory Project Manager	Doug Satteson Project Architect	Nina Popovich Project Architect	Lynn Goldfarb Senior Project Interior Designer	Emi Shimomura Interior Designer
GSA, Department of State J24 Confidential Location	●	●	●	●		
GSA Nuclear Regulatory Commission Workplace Strategy + Design Rockville, Maryland		●			●	
GSA, TI for DOS at American Red Cross Building Washington, DC		●				●
GSA MOBIS Workplace Strategies Nationwide	●				●	
FDIC Term Contract Nationwide	●	●		●	●	●
Fannie Mae Headquarters Renovations Washington Metropolitan Area	●				●	
DHS Agency Headquarters at St. Elizabeths Campus, Phase 1A New Construction Washington, DC		●		●	●	●
GSA, Historic Buildings at St. Elizabeths Campus, Phase 1B Adaptive Reuse Washington, DC		●		●	●	●
International Monetary Fund (IMF) Tishman Speyer Renovations Washington, DC	●	●				
Thales Communications Multiple Interior Renovations Clarksburg, Maryland	●	●			●	
Brandywine 7101 Wisconsin Avenue Exterior and Interior Renovation Bethesda, Maryland	●		●			
Altegrity National Contract Test Fits Minneapolis, Minnesota	●	●				
Linklaters Law Offices Washington, DC	●	●				
One NOMA Washington, DC	●	●		●		
U.S. Army Corps of Engineers Administrative Facility, BRAC 132 Fort Belvoir, Virginia				●	●	●
The Carlyle Group Headquarters and Multiple Office Renovations Washington, DC and multiple locations					●	●
MetLife Government Affairs Office Washington, DC	●				●	
Vornado Courthouse Plaza Arlington, Virginia			●			●
NIH Porter Neurosciences Research Center, Phase II Bethesda, Maryland				●	●	●
Airlines for America Headquarters Relocation Washington, DC	●	●				
Smithsonian Institution Term Contract* Washington, DC	●		●			
Smithsonian National Museum of American History, Black Box Galleries* Washington, DC	●		●			
OBO Embassy IDIQ, Multiple Offices and Mission Critical Environments* Confidential Locations	●		●			

* denotes projects completed prior to joining Perkins+Will



PB&J



HOW DO YOU MAKE A PB&J SANDWICH

Please describe the steps you plan to take to make a peanut butter & jelly sandwich.

We have a loaf of bread, a jar of new peanut butter and a squeeze bottle of grape jelly.



PROPOSAL RESPONSE



THE BASICS

Organize your response based on the structure of the request

Follow the instructions and make sure you have responded to everything the client has asked for

Bigger isn't better, include only the most relevant information

Timely Response



RESPONDING TO A DATA CALL

Follow the directions

Your input will not be inserted “as-is”

Make it easy to reformat – better yet use the templates, if provided!

Write about THIS project

Title your personnel appropriately



SAMPLE: DATA CALL

Subject: DATA CALL: GSA National AEI IDIQ

Importance: High

Team,

In the essence of time, I am sending a group email following up on our phone calls/emails about this pursuit. We have been shortlisted and need to submit the Phase II proposal by Wednesday (10/21) so we need to move fast. Please **provide the following by Monday morning at 10am**. I am happy to receive items piecemeal and will be working over the weekend!

Please provide the following:

1. One resume per discipline (use attached template)
2. Questionnaire (attached)
3. Logo
4. SF330 Part II for relevant offices
5. Salary Table (attached)

I would appreciate **confirmation you have received this request AND can deliver by this deadline.**

DATA CALL: RESUMES

- Title your staff per the RFP (i.e. Mechanical Engineer – not Principal-in-Charge)
- Reformat per template – long format, SF330, VA AE form, etc.
- Know the appropriate forms and the RFP

Laura Morris, MCR, IIDA, LEED® AP

Managing Principal



Laura Morris is a managing principal for Interiors and Planning + Strategies and an associate principal in Perkins+Will's Washington, DC office. With more than 20 years in the design and real estate profession, Laura has worked on both sides of the client table, managing and designing projects for small and large corporate and government clients, as well as working on the client side in project management and strategic portfolio planning.

As a former real estate manager for MCI and Sprint, Laura understands how large corporate real estate organizations function. She has worked with prominent clients to help them maximize their real estate portfolio and develop a workplace strategy to support business goals. She has extensive experience with programing, planning, workplace strategy, design, project management, and project delivery.

EDUCATION

Master of Human Environment and Design, Michigan State University, 1990.

Bachelor of Interior Design, Minors in Business and Visual Arts, Auburn University, 1988

REGISTRATIONS

Master of Corporate Real Estate (MCR)

National Council for Interior Design Qualification (NCIDQ) Certificate No. 12815

LEED Accredited Professional

PROFESSIONAL AFFILIATIONS

International Interior Design Association (IIDA), Professional Member

CoreNet Global, 1996–present; Chapter Chairman and Global Component Leader, 2012–2013; Chapter President, 2011–2012; Chapter Vice President, 2010–2011; Awards Gala Co-chairman, 2008

National Association of Industrial and Office Properties (NAIOP), Maryland/DC and Virginia Chapters, 2010–present; NAIOP Virginia Education Committee, 2012

Commercial Real Estate Women (CREW)

International Facilities Management Association (IFMA), Member, 1989–1996

Amerson Educational and Cultural Associate, Washington, DC

RELEVANT EXPERIENCE

Government
Department of Homeland Security'
Renovation
Washington, DC

Department of Homeland Security
U.S. Citizenship and Immigration Services
National Engagement
Washington, DC

Department of Homeland Security
U.S. Citizenship and Immigration Services
New Office Space
Washington, DC

The Halle Companies
Department of State
J24 Tenant Improvements
Washington, DC

Equal Employment Opportunity
Commission (EEOC)
Headquarters
One NOMA Station
Washington, DC

Federal Bureau of Investigation
Quantico Complex Space Planning
Quantico, VA

General Services Administration (GSA)
Food and Drug Administration
Headquarters and Laboratory Campus
Master Plan and Consolidation
White Oak, MD

Smithsonian*
National Museum of American History
Black Box Galleries
Washington, DC

Smithsonian Institution*
Term Contract
Washington, DC

USCIS at One
Tenant Fit-out
Washington, DC

Corporate + C
Fannie Mae
Master Plan,
Construction
Washington, DC

Federal Depo
(FDIC) / Reso
Master Plan C
Washington, DC

MetLife
Government /
Tenant Fit Out
Washington, DC

Sandy Spring
Headquarters
Center, New C
Data Center,
Bethesda, Co

*experience prior

DGS 30-004 (Rev. 08/14)		ARCHITECTURAL / ENGINEERING FIRM DATA PERSONNEL QUALIFICATIONS		BFFB 2471512078AE
Submitted By (Firm Name): PERKINS + WILL				
Submitted For (Project Title): A/E Services for Construct Utilities Infrastructure Distribution / A/E Services for Robinson Hall Demolition + New Construction				
1) NAME: GENE KLUESNER, AIA, LEED® AP		TITLE: Associate Principal OFFICE: Washington, DC		
TYPICAL DUTY OR ASSIGNMENT:		Managing Principal		
2) ASSIGNMENT FOR THIS PROJECT:		Managing Principal		
% OF TYPICAL 40 HOUR WORKWEEK THIS PERSON WOULD SPEND ON THIS PROJECT:		20 PERCENT		
3) EMPLOYEE OF:		Perkins+Will		
4) YEARS OF EXPERIENCE:		30 YEARS TOTAL EXPERIENCE 10 YEARS WITH THIS FIRM		
5) EDUCATION: COLLEGE / DEGREE(S) / YEAR / SPECIALIZATION:		Iowa State University / Bachelor of Architecture / 1982		
6) ACTIVE REGISTRATION: Year first registered / State / Discipline or Type		1994 / Commonwealth of Virginia / Registered Architect / 0401-009004 2006 / Florida / Registered Architect / AR93598 2006 / LEED Accredited Professional		
COMMONWEALTH OF VIRGINIA 6-DIGIT REGISTRATION / CERTIFICATE / LICENSE NUMBER: ARCHITECT# 0401-009004 or ENGINEER#				
7) EXPERIENCE AND / OR QUALIFICATIONS RELEVANT TO THIS PROJECT: (List up to six (6) relevant projects and indicate your role and responsibility for each.)				
Project		Role / Responsibility		
University of Florida, Clinical Translational Research Building Gainesville, Florida		Managing Principal		
Florida International University Academic Health Center 5 Stempel College of Public Health Miami, Florida		Managing Principal		
Florida International University Academic Health Center 4 Science Classroom Complex Miami, Florida		Managing Principal		
University of Miami School of Education Coral Gables, Florida		Managing Principal		
Miami Dade College, Prototypical Learning Environments Miami, Florida		Managing Principal		
Princess Nora bint Abdulrahman, University for Women Riyadh, Saudi Arabia		Managing Principal		
The foregoing is a statement of fact.				
Typed Name: Gene Kluesner, AIA, LEED® AP		Signature:		
Title: Managing Principal		Date: 11/23/2015		

DATA CALL: PROJECTS

- Likely used in a “relevant project list” accompanied by project thumbnail pictures
- Used in Project Approach and Consultant Profile sections
- Key consultant may be asked to provide a full project page
- Know the appropriate forms and the RFP

DEPARTMENT OF STATE OVERSEAS BUILDINGS OPERATIONS U.S. NEW EMBASSY COMPOUND



LOCATION Bujumbura, Burundi
COMPLETION DATE 2012
CONSTRUCTION COST Confidential
SIZE 10 acre compound
 Chancery (New Office Building): 7,000 square meters (23,000 square feet)
LEED® Gold

Perkins+Will provided conceptual design through bridging documents for the new embassy compound in Burundi and completed three related studies for the Department of State (DOS), Overseas Building Operations (OBO).

- Initial Planning Survey (IPS) explored constructability of potential building sites and analyzed local laws, rules, and process necessary for a U.S. contractor to lead a construction process in the host country.
- Integrated Planning Review (IPR) recommended a preferred project site and design options that would satisfy the government's program and requirements.

Perkins+Will has developed this information for the Department of State only.

- Sustainability Recomm addressed requirements Energy Independence a examined the building-ii of integrating sustainab into the new embassy d explored how these coul the framework of the DC Embassy Design (SED). related recommendatio applicability beyond the

The site development pa new embassy compound zoning study and concep ings and drawings, whic helped to present to Bur and planning authorities was successfully approv

F. EXAMPLE PROJECTS WHICH BEST ILLUSTRATES PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT (Present as many projects as requested by the agency, or 10 projects if not specified. Complete one Section F for each project.)		20. EXAMPLE PROJECT KEY NUMBER 2 of 5	
21. TITLE AND LOCATION (City and State)		22. YEAR COMPLETED	
		PROFESSIONAL SERVICES	CONSTRUCTION (if applicable)
Shanghai Natural History Museum - Shanghai, China		April 2015	April 2015
23. PROJECT OWNER'S INFORMATION			
a. PROJECT OWNER	b. POINT OF CONTACT NAME	c. POINT OF CONTACT TELEPHONE NUMBER	
Shanghai Science & Technology Museum	LI Yansong	+8621 68622000-7023	



The Shanghai Natural History Museum, designed by Perkins+Will's Global Design Director Ralph Johnson, is a 44,517 square meter (479,180 square foot) museum offering visitors the opportunity to explore the natural world through the display of more than 10,000 artifacts from all seven continents. The building includes exhibit spaces, a 4D theater, an outdoor exhibit garden, and a 30-meter tall atrium that welcomes visitors with an abundance of natural light filtered through a striking glass wall inspired by the cellular structure of plants and animals.

The museum was inspired by the garden design of its homeland, integrating the spirit of nature and architecture. Adjacent to an urban sculpture park, the museum rises up as a spiraling landscaped plane surrounding an oval pond, its shape recalling the harmonious forms and proportions of a nautilus shell, one of the purest geometric forms found in nature. Through its relationship to the site, the drama of the exterior features, and its interior detailing, the museum represents the harmony of man and nature.

Within the spiraling plane is an oval courtyard containing a stepped garden composed of rock formations and water in the tradition of the "Mountain Water Garden." The structural framing and sun shade lining the courtyard is an abstraction of patterns found in traditional Chinese garden pavilions, while also referencing the human cell. The north wall suggests the layering of tectonic plates, with the "living" east wall forming an arcade representing the vegetation of the earth's surface. Together, these features focus our awareness on the fundamental elements of the natural world: plants, earth and water.

MORE SAMPLES

 **ROBERT SILMAN ASSOCIATES**
STRUCTURAL ENGINEERS

Washington, DC

Robert Silman Associates (RSA) specializes in providing high quality structural engineering services for large, technically complex projects. The firm has served as structural engineering consultant on more than 18,000 projects. New construction accounts for 50% of their entire workload.

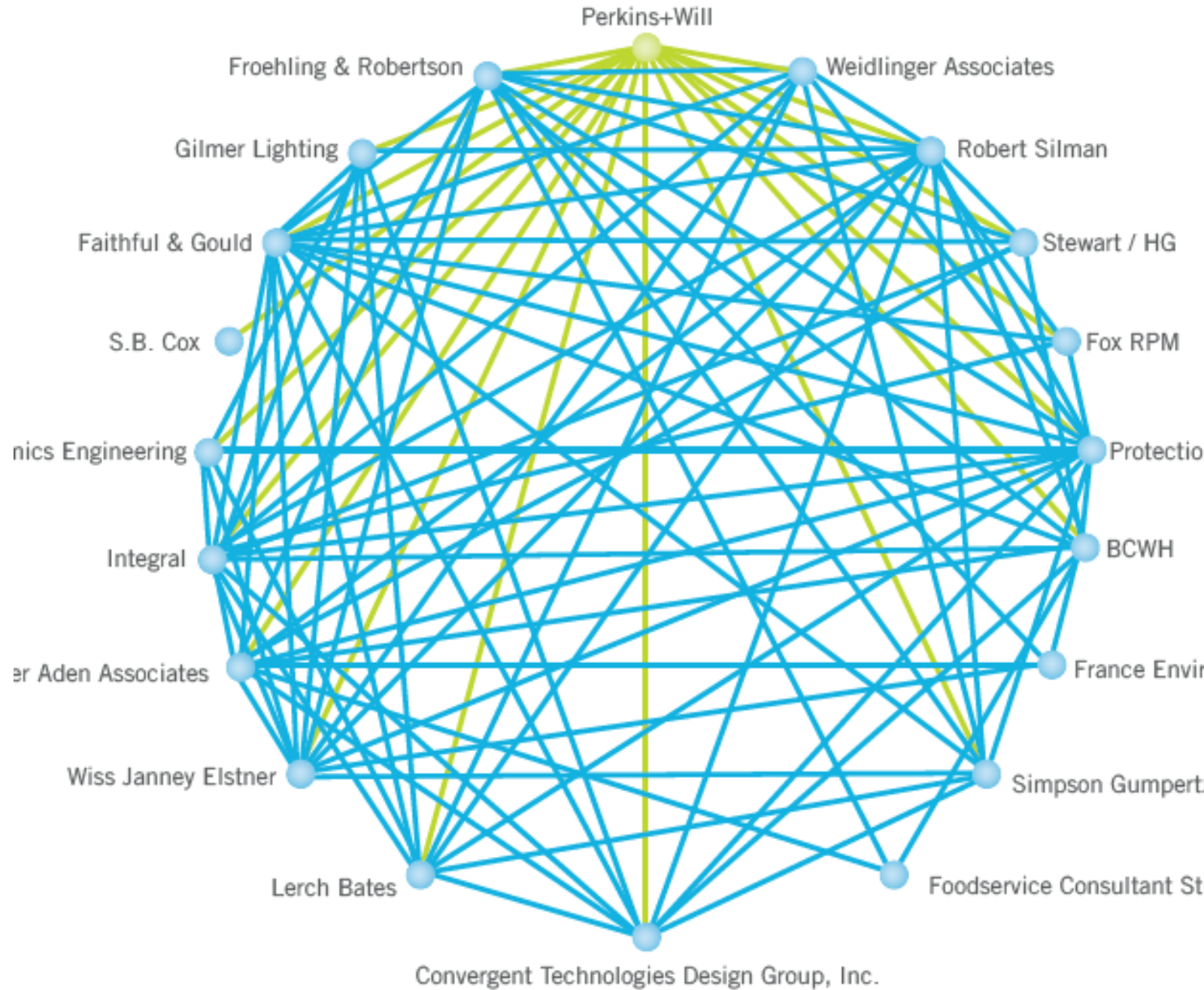
RSA has developed a special expertise in the engineering of historic buildings. In fact, RSA has consulted on more than 400 registered landmark buildings. Their proficiency in the use of preservation techniques has aided their efforts in saving America's architectural heritage. Special areas of expertise are in the assessment and monitoring of structures, façade investigation and repairs, investigation of building failures and response to emergency structural situations.

With offices in New York City, Washington, DC, and Boston, the firm presently numbers 130, of whom more than 50 have professional registration and over 20 are LEED Accredited Professionals. RSA has a long history of working with both the Commonwealth of Virginia, DGS, and Perkins+Will including the recently completed George Mason University Exploratory Hall and Commonwealth Center for Advanced Manufacturing. Other representative projects include: Virginia State Capitol, Richmond Main Street Station and Trainshed, Patrick Henry Building, Virginia Commonwealth University, and U.S. Supreme Court Building.

Questionnaire for GSA A/E/I IDIQ

Name of Firm:	Global Engineering Solutions
Discipline(s) engaged for this pursuit:	Mechanical, Electrical, Fire Protection and Plumbing Engineering Services
Year Established:	2002
Number of Employees:	71
Location of All Offices (City, State):	6700A Rockledge Drive, Suite 300 Bethesda, MD 20817
DBE Status (if applicable – please specify):	US Small Business Administration (SBA) – SDB, WOSB, EDWOSB
List any experience with GSA:	<p>GES has experience working with the U.S. General Services Administrations:</p> <ul style="list-style-type: none"> • The Department of State Relocation to American Red Cross Building, Washington, DC, completed with Perkins+Will • Forrestal Building, Washington, DC • Mothballing/Stabilization Study for Facilities at Walter Reed Army Medical Center, U.S. General Services Administration, NCR
List any experience with IDIQs:	Extensive experience with 11 IDIQ contracts
Firm Profile:	<p>Global Engineering Solutions (GES) is a certified Woman-Owned Small Business (WOSB), Small Disadvantaged Business (SDB) and Economically Disadvantaged Woman-Owned Small Business (EDWOSB), engineering, program management and construction management firm specializing in mechanical, electrical, plumbing and fire protection engineering (MEP & FP). As one of the premier engineering firms in the area, GES is recognized as a leader in the design of facilities for government, education, health care and commercial clients.</p> <p>With offices in Bethesda, Maryland, Washington, DC and New York, NY we are able to provide the expertise to satisfy a wide range of our clients' needs. We are staffed by a team of highly qualified professionals who are known for their commitment to excellence and their ability to complete projects on time and within budget. Their innovation and focus on quality has been responsible for the growth of our firm, and has earned GES recognition from <i>INC. Magazine</i>, <i>Consulting-Specifying Engineer</i> and the <i>Washington Business Journal</i>.</p> <p>Our experience covers a wide range of services, projects and delivery methods. We have provided feasibility studies, building assessments, master plans, design reviews, energy audits, value engineering, code analysis, MEP & FP system designs, construction administration, program management and construction management services on new construction, renovation, and historic preservation projects.</p>

INTEGRATION OF CONSULTANT DATA



MORE SAMPLES

CONSULTANT TEAM



MECHANICAL / ELECTRICAL ENGINEERING: INTEGRAL GROUP

Integral Group is an interactive global network of design professionals collaborating under a single deep green engineering umbrella. They provide a full range of building system design and energy analysis services, with a staff widely regarded as innovative leaders in their fields. Located in eleven offices across North America, along with an international network of affiliates, Integral's passion for sustainable design runs deep.

The firm's integrated approach to building systems design allows them to enhance opportunities that nature provides, working in harmony with a building's environment to reduce its reliance on outside energy sources. Integral specialize in the design of simple, elegant, cost-effective systems for high performance building environments and provide comprehensive analyses that help prioritize their energy saving potential and carbon reduction effect.

Integral's design approach differs dramatically from traditional Mechanical, Electrical, and Plumbing engineering firms, they focus exclusively on highly energy efficient and sustainable design projects. An innovative leader in building MEP systems design, Integral Group designed the first zero carbon, zero energy commercial building in the United States, first laboratory with chilled beams, first laboratory with radiant ceiling panel cooling, first

net zero energy, zero carbon and LEED Platinum laboratory, first LEED Platinum rating for a laboratory in a historic building, first campus fuel cell installation, first LEED Gold microchip manufacturing plant, first pre-certified LEED Platinum data center, and first LEED Platinum office building in Canada.

Integral Group has significant expertise in higher education projects in addition to their recent work at GMU on Exploratory Hall. They provided services for a number of Colleges and Universities throughout the Commonwealth and are presently providing engineering services to University of Virginia for the renovation of the Chemistry and Gilmer Hall buildings, the University of Mary Washington for the renovation and additions to the Jepson Science Center and for the new University Center at Longwood. Integral Group also has provided design services on a variety of projects for Virginia Tech, Virginia State University and William and Mary.

George Mason University Project Team: The Integral Group team is led by Principal in Charge, Tom Simpson, a managing principal and leader in Higher Education design. He brings extensive experience with local institutions including the above projects at George Mason University, University of Virginia, Virginia Tech and Longwood University. Their team has years of experience with designing, developing, and coordinating projects from the initial design phase through construction.



STRUCTURAL ENGINEERING: HOPE FURRER (SBE)

Hope Furrer Associates, Inc. is a full-service structural design and consulting firm established in 1992. The firm provides structural engineering services to architects, government agencies, developers, contractors, and other engineering concerns. Expertise includes university facilities, corporate office buildings, retail facilities, hotels, residential buildings, medical facilities, educational complexes, and parking facilities, as well as investigations and structural evaluations of commercial, institutional, educational, and telecommunication facilities.

The firm features an award winning portfolio comprised of more than 50 Higher Education projects for more than 20 Colleges and Universities totaling over \$1 billion in construction costs. These projects include renovations, additions and new construction of athletic facilities, libraries, classroom buildings, laboratories, student centers, performance centers and dormitories. While the majority of the firm's work includes substantial new construction, we are also experienced in projects that require renovation of existing facilities to allow for functional changes or upgrades to the existing facilities.



PLUMBING / FIRE PROTECTION / FIRE ALARM / CAMPUS UTILITIES: WFT ENGINEERING (SBE, MBE)

WFT Engineering, Inc. (WFT) is a local SWaM-certified minority-owned engineering design firm providing mechanical, electrical, plumbing, fire protection, fire alarm, life safety, and code analysis design services as well as commissioning, and construction administration services in the Mid-Atlantic region. Started in 1995, the firm has grown to an award-winning 36-person firm with projects varying from small task order renovations, infrastructure upgrades, and feasibility studies, to new construction of multi-million dollar research facilities.

WFT's experience includes more than 75 studies, renovations, and/or new construction projects for universities, colleges and community colleges. In the past five years alone, they have provided design for 15 new academic buildings including 9 classroom/lab facilities, 2 student centers, 4 residence halls, all designed for LEED Silver minimum certification, in addition to other major renovations and infrastructure upgrades for academic buildings. WFT's plumbing design experience includes major renovations to University of Virginia's Gilmer Hall (232,000 GSF) and Chemistry Building (273,000 GSF) teamed with Perkins + Will and Integral.

WFT's qualifications include:

- More than 40 projects designed for LEED certification
- Familiarity with BCOM; three staff have attended CPSM seminars within the last three years
- Various staff members have previous experience on projects involving BCOM

- Extensive experience with "design not to exceed" budgets
- Use of Revit MEP modeling to provide "live 3D" visuals of building components

- Experience with projects in conformance with the State's Construction and Capital Outlay procedures including Codes, Standards, Accessibility and Building Efficiency

- GMU project experience includes University Hall drawing reviews for three tenant floors; LAN room upgrades for an APC installation; and preparation of electrical specs for the Northeast Sector Development.

- A staff member has previous experience at GMU including electrical design for the Northwest Housing VIII-A Complex, two new student housing buildings totaling 216,700 GSF, completed in 2011.

WFT's relevant experience includes design of utility distribution systems, high temperature hot water (HTHW) and chilled water distribution systems, and campus infrastructure loop systems including the following projects:

Towson University Burdick Hall Expansion - E/P/FP design for a \$34M, 94,500 GSF expansion of the campus recreation facility, to be the new campus hub. Additional services

FIRM	ROLE IN PROJECT	SWaM	Virginia-based Incorporated Business
Perkins+Will	Architecture / Planning	●	●
BCWH	Space Planning / Programming / Interiors	●	●
Integral	Mechanical, Electrical, Plumbing	●	●
Wiss Janney Elstner	Historic Preservation	●	●
Froehling & Robertson	Geotechnical Engineering	●	●
Convergent Technologies	IT / Telecom / Security / AV / Acoustics	●	●
Gilmer Lighting	Lighting Design	●	●
Draper Aden Associates	Civil Engineering	●	●
Protection Engineering Group	Fire Protection / Life Safety	●	●
Foodservice Consultant Studio	Food Service	●	●
Stewart / HG	Landscape Architecture	●	●
France Environmental	Asbestos/Hazmat	●	●
S.B. Cox	Demolition Consulting	●	●

SMALL BUSINESS COMMITMENT

The Small, Women-owned, and Minority-owned Business (SWaM) certification program is a state program of the Commonwealth of Virginia. The purpose is to enhance procurement opportunities for SWaM businesses participating in state-funded projects. Perkins+Will/BCWH is committed not only to meeting specified Small Business goals for this project, but also provide meaningful participation. We have established relationships with numerous SBE/MBE/WBE firms across the nation and have found our collaborations to be mutually rewarding. Historically, Perkins+Will/BCWH has sought and utilized services of qualified local, small, disadvantaged, minority, woman and veteran-owned businesses. Approximately 30% of the total workload of Perkins+Will is performed for government and other public agencies with requirements for the maximum practicable contracting to these disadvantaged firms in accordance with the provisions of Public Law 95-507.

Our proposed project team exemplifies our firm's commitment to securing opportunities for small businesses participating in a state funded project such as the General Assembly Building and are strong proponents of the importance of building the Commonwealth of Virginia's professional business community. In addition to being experts in the design of government and institutional buildings, a number of the firms comprising our team represent local Virginia-based firms with

like-type experience and are significant contributors to the Commonwealth of Virginia tax base. A large percentage of our highly qualified team is based and/or incorporated within the Commonwealth of Virginia with resulting revenues supporting the continuation of existing jobs within the consultant firms as well providing a solid economic base for Virginia-based businesses overall. The Virginia-based businesses' and Virginia resident employees engender strong financial returns for Virginia as well as the local community.

We are confident in our ability to achieve a substantive engagement of SWaM firms for this contract with significant and participatory subconsultant roles. We are equally confident of their abilities to deliver design services commensurate with the importance of this project. Each of them has been hand-picked to provide a dedicated, experienced team for this project with a successful history of working with Perkins+Will/BCWH. Our team would welcome the opportunity to collaborate with each other and with the Department of General Services on this critical project.

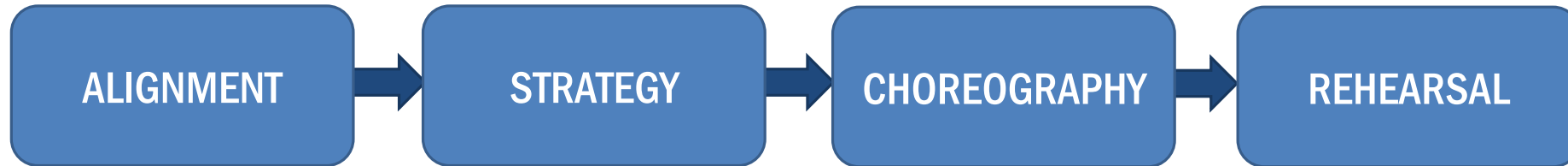
The chart above depicts the Perkins+Will/BCWH Team members that meet the small business criteria. A large percentage of our highly qualified team is based and/or incorporated within the Commonwealth of Virginia with resulting revenues supporting the continuation of existing jobs within the consultant firms as well as providing a solid economic base for Virginia-based businesses overall.



PRESENTATION/INTERVIEW



PRESENTATION DEVELOPMENT



- ▶ READ the RFP
- ▶ Conduct pre-interview reconnaissance
- ▶ Ask marketing team to summarize project and client information for team members
- ▶ Why Us? – link info about the project to strategic, competitive differentiators

- Develop presentation strategy collaboratively to ensure cohesive approach
- Determine speakers and establish their content goals
- Make careful team choices and solicit help for weaker speakers
- Set the initial presentation timing reflecting the importance of topics
- Use lean-ins and partner presentations to save time
- Visuals strategy based on audience, likely strategy of competitors, layout and size of room, time of the day, and interview content

- The Stumble-Through – walk through content of each speaker
- Design the presentation and speaker flow to help team come across as likeable, approachable, and knowledgeable
- Reinforce deadlines and sufficient time for rehearsals
- Logistics – ability to rehearse, produce, travel times, resources
- Plan Q&A – anticipate answers, assign answering responsibility and rehearse answers

- Well before final rehearsals, check in with team about development process
- Final run-through – no interruptions final rehearsal for timing and content
- ‘Blocking’ Rehearsal – sit and move as would in the interview
- Q&A Rehearsal
- Logistics – arrange rides, supplies and directions

THINGS TO AVOID

Don't:

Let your presentation team outnumber the selection panel

Ever debate or argue a point in front of the selection panel

Use overly complicated A/V materials or setup

Use a live website

Talk down to your audience

Forget to have some type of relevant leave behind





DEBRIEF



GETTING FEEDBACK

Every time, win or lose

Don't ask why you lost. Ask "How could we improve our proposal?"

Ask to see the winning proposal

After getting client feedback, brainstorm what you could have done to change the outcome

Provide feedback to your team



thank **Y** ou

