

## 8/28/24 Notes

### DRAFT v. 2 Outline for Owner Readiness Webinar

- Certified “big owner”
  - Jeannie Natta
  - Jessica Murphy
- Certified “small owner”
  - School District - Karen M.
  - Cities, Counties, Ports
- First time owner (who have finished and have feedback on lessons learned)
  - Benton County
  - City of Wenatchee

Focus on the End game not just procurement.

### Introduction – Purpose and intent of the webinar

*You are the procurement official and getting your “clients” up to speed.*

### Panel Introductions

#### Step 1. Project Initial Assessment

- What is the target project?
  - Goals
  - Scope
  - Schedule
- Budget and Funding
  - What is allocated?
  - Other funding options
  - Funding strings (e.g., federal funds may have procurement implications)
- Initial “approval” to pursue the project (e.g., budget, capital plan approval, etc.)

#### Step 2. Procurement Options, Review, and Identification.

- What is alternative public works?
- Contracting Method Assessment – project appropriateness, statute
- Design-Bid-Build compared/contrasted to alternative public works.
  - Application review

#### Step 3. Getting ready.

- **Talk to other owners. (1)**
  - Where to find information and other owners
    - Organizations/Associations for your agency type
    - Go to training (e.g., AGC Education Foundation, DBIA)
    - CPARB Training resource guide
    - PRC Application Review
- **Assess your own agency, is internal team is ready for alternative delivery.**
  - Confirm project team.
  - Staff
  - Contract Owner’s Rep (Prep boss’ boss, etc.)
    - Maybe there is a steering committee.
  - Procurement/purchasing.
    - RFQ/P Development
    - Contract Development
  - Project management, construction management

- Org chart
- Alignment with your agency's governing board and internal procedures (e.g., decision process, key is quickly, delegation/signature authority)

### **Assembling the Project Team**

- Staff (who is available, experience, training, etc.)
  - Management
  - Governance
  - Legal
  - Purchasing
  - Temp/Limited staff augmentation.
  - Owner's Advisors/Special Counsel
  - Oversight committee for your agency (e.g. school board oversight committee)
  - Training needs and support identified/requested.
- **Hire Advisors**
    - Special counsel
    - Project Managers
  - **Attend Training/Train**
  - **Assess your project is a good candidate for alternative delivery.**
    - *Make the contracting method decision* (e.g., DB, GCCM)
    - *Outline target schedule.*
    - *Start "marketing"*
  - **What do you need to do to get there?**
    - Permission needed.
    - Who is involved internally (e.g., purchasing/finance, public works, board, or governance, etc.)
    - Other
  - **Development and Procurement of minority women veteran owned firms/small business**

### **Step 4. Going to PRC**

- How to prepare your application to PRC
- Describe PRC
- Best Practices when submitting a PRC application.
- Key elements of application
  - Presentation (who is involved, why, etc.)

### **Closing thoughts by panel**

- What are risks or areas of consideration when considering alternative PW?
- Lessons learned.
- 1 thing I wish I knew the first time going through alternative PW.

### **Resources**

- MRSC Alternative Delivery topic page
- CPARB Education Connections Committee

### **Education Committee NEXT STEPS**

- 1) MRSC confirm timing of session with training calendar.
- 2) Josh “pitch” to PRC

Take to next PRC Business Meeting (7/25)

- Panel with moderator
- 1 hours recorded Webinar
- Need volunteers (a couple owners, contractors, small business?)
- 30 minutes to the present to PRC the idea

- 3) Project feedback committee notes