



## CERTIFIED BUSINESS PRECONSTRUCTION

- Certified Business Plan
  - Established early target goal of 18% certified business utilization based upon a \$100M GMP
  - Plan established and approved by PPS during design development

### Target at time of RFP (April 2018):

Original RFP Forecast	Targeted Participation
\$100,000,000	\$17,327,306
Targeted Participation	18%

### Procurement Plan Target (October 2018):

Procurement Plan Target	Targeted Participation
\$151,500,000	\$26,719,958
Targeted Participation	18%

### Scope package procurement approach from certified business plan:

Madison High School Subcontractor Scope Packages						Solicitation Method		Procurement Method				
Scope Package	Scope Description	Approx \$ Value	Targeted CB \$ Range		Targeted CB % Range		Informal	Formal	Direct Award	Request for Proposal	Best Value	Traditional Low Bid
1.30	Surveying	\$ 60,000	\$ 39,299	\$ 45,194	50%	58%		X				X
1.50	Site/Safety Support Services	\$ 750,000	\$ 196,496	\$ 225,970	20%	23%		X				X
1.70	Final Clean - New Construction	\$ 150,000	\$ 117,898	\$ 135,582	60%	69%		X			X	
1.71	Final Clean - Renovation	\$ 100,000	\$ 78,598	\$ 90,388	60%	69%		X			X	
2.40	Building Demolition/Abatement/Sawcutting	\$ 2,000,000	\$ 261,995	\$ 301,294	10%	12%		X		X		
2.41	Soft Demolition/Abatement - SW Wing	\$ 2,500,000	\$ 327,493	\$ 376,617	10%	12%		X		X		
2.42	Soft Demolition/Abatement - N and SW Wings	\$ 1,500,000	\$ 1,964,960	\$ 1,964,960	100%	100%	X	X	X			
3.30	Structural Concrete and Rebar	\$ 7,500,000	\$ 1,964,960	\$ 2,259,704	20%	23%		X		X		
3.33	Shoring/Shotcrete	\$ 350,000	\$ 91,698	\$ 105,453	20%	23%		X		X		
4.20	Masonry - Structural CMU and Rebar	\$ 1,000,000	\$ 130,997	\$ 150,647	10%	12%		X				X
4.21	Masonry - Brick Veneer	\$ 1,500,000	\$ 196,496	\$ 225,970	10%	12%		X				X
5.10	Structural & Misc. Steel	\$ 6,125,000	\$ 1,203,538	\$ 1,384,068	15%	17%		X		X		
5.12	Fiber Reinforced Assemblies	\$ 1,500,000	\$ 98,248	\$ 112,985	5%	6%		X		X		
6.40	Finish Carpentry	\$ 1,700,000	\$ 111,348	\$ 128,050	5%	6%		X				X
7.10	Waterproofing/Damproofing/Expansion Joints	\$ 550,000	\$ 144,097	\$ 165,712	20%	23%		X			X	
7.50	Roofing - New Construction	\$ 2,000,000	\$ 130,997	\$ 150,647	5%	6%		X				X
7.51	Roofing - Renovation	\$ 1,200,000	\$ 78,598	\$ 90,388	5%	6%		X				X
7.52	Roof Accessories	\$ 45,000	\$ -	\$ -	0%	0%		X				X
7.60	Metal Paneling and Flashings	\$ 1,500,000	\$ 98,248	\$ 112,985	5%	6%		X		X		
8.10	Doors, Frames and Hardware	\$ 1,850,000	\$ 605,863	\$ 696,742	25%	29%		X			X	
8.30	Specialty Doors	\$ 425,000	\$ -	\$ -	0%	0%		X				X
8.34	Folding/Operable Partitions	\$ 200,000	\$ -	\$ -	0%	0%		X				X
8.40	Exterior Glass	\$ 4,000,000	\$ 261,995	\$ 301,294	5%	6%		X		X		
8.41	Interior Glass	\$ 350,000	\$ 45,849	\$ 52,726	10%	12%		X			X	
8.60	Skylights	\$ 330,000	\$ -	\$ -	0%	0%		X				X
9.20	Exterior Framing/Sheathing	\$ 2,300,000	\$ 602,588	\$ 692,976	20%	23%		X		X		
9.22	Interior Framing/Drywall/Ceilings - New Construct	\$ 4,000,000	\$ 1,047,978	\$ 1,205,175	20%	23%		X		X		
9.23	Interior Framing/Drywall/Ceilings - Renovation	\$ 2,800,000	\$ 1,283,774	\$ 1,476,340	35%	40%		X			X	



## Outreach Events

### CERTIFIED BUSINESS PRECONSTRUCTION

- What was the outreach plan?
  - Trade Shows
  - Engage certified business organizations to discuss the project.
  - Research local certified business marketplace
  - Work with prime subcontractors to engage tier certified businesses
- What was done for outreach?
  - Attended 14 outreach events
  - Contracted with Group AGB to utilize his network of certified firms and attend networking/outreach events

<u>Event</u>	<u>Date</u>	<u>Activity</u>	<u>Flyer Used</u>
OAME Annual Trade Show	May 10, 2018	PPS booth, meet/greet vendors	Yes
PBDG Monthly Meeting	September 19, 2018	Overview project/ bidding opportunities	Yes
Fortis Subcontractor Open House @ MHS	October 29, 2018	Presentation on project, bidding opportunities and strategy (by Natasha Carroll, Blain Grover) <sup>3</sup>	Yes
Growing Portland Open House	October 30, 2018	Overview project/ bidding opportunities	Yes
PBDG Monthly Meeting	November 14, 2018	Presentation on project, bidding opportunities and strategy (by Andre Baugh, Natasha Carroll, Blain Grover)	Yes
“Meet the Primes” OAME event	November 16, 2018	Overview project/ bidding opportunities	Yes
PBDG Monthly Meeting	January 16, 2019	Overview project/ bidding opportunities	Yes
OAME Coffee & Issues	January 25, 2019	Overview project/ bidding opportunities	Yes
BestHQ Executive Briefing	January 29, 2019	Overview project/ bidding opportunities	Yes
Tet Lunar Festival	February 2, 2019	PPS/Opsis/Fortis booth, project overview	Yes
OAME Coffee & Issues	February 22, 2019	Overview project/ bidding opportunities	Yes
PBDG Monthly Meeting	March 20, 2019	Overview project/ bidding opportunities	Yes
OAME Coffee & Issues	March 29, 2019	Overview project/ bidding opportunities	Yes
OAME Annual Trade Show	May 10, 2019	Fortis booth, meet/greet vendors	Yes



## CERTIFIED BUSINESS - PRECONSTRUCTION

- Bid Packages
  - What was the plan?
    - Breakdown large bid packages.
    - Focus on 2<sup>nd</sup> tier participation.
    - Hold bid package open houses.
    - Phone call campaign during bidding period.
  - What actually happened?
    - A total of 58 scope packages were created where a typical project of this type would have around 40.
    - Fortis procured major large trade scope package utilizing an RFP process where one of the requirements was to provide certified business participation within scopes. This has been implemented .
    - Phone call campaign took place for each bid package.

### Best Value Scorecard Example for Early Solicitation:

No.	Category	Points Available	Points Awarded	Scoring Criteria
1	Cost	60		The lowest bonafide bid shall receive 60pts. Other proposers shall receive 60pts less one (1) pt for each 1% deviation from the lowest responsive bid.
2	CB Participation	15		Maximum points if percentage of certified business work is greater than or equal to 50% for your scope of work
3	Safety Record	10		Maximum points awarded if average EMR is for the last three years is <= 1.00, recordable incident rate is <= 7.00, and lost time rate <= 3.50.
4	Key Personnel	5		Key team members must have at least two (2) similar projects to receive maximum points.
5	Similar Project Experience	10		Subcontractors must have at least (3) projects of equal or greater contract volume and similar project type to be awarded maximum points.
	<b>Totals</b>	<b>100</b>		



## Procurement Plan Target Highlights

### **CERTIFIED BUSINESS – Current Results**

- Bid Packages
  - What actually happened?
    - A total of 131 bids received for the project
    - A total of 15 bids received from certified businesses
  
- Current Certified Business Utilization
  - Currently at 11.92% of projected GMP

Major Trade Targets	Targeted Participation	Current Projected Participation
Demolition / Abatement	\$2,554,448	\$2,782,841
Structural Concrete / Rebar	\$1,964,960	\$1,977,359
Structural Steel	\$1,203,538	\$879,146
Framing / Sheathing / Drywall	\$2,331,752	\$1,500,000
Plumbing / HVAC	\$3,600,000	\$2,534,094
Electrical	\$2,600,000	\$3,058,037
Doors / Frames / Hardware	\$605,863	\$1,395,725
Painting	\$1,414,771	\$942,464
Site Utilites / Sitework	\$1,833,962	\$619,910
Site Concrete	\$1,309,973	\$1,957,035
<b>TOTALS</b>	<b>\$19,419,267</b>	<b>\$17,646,611</b>

### Current Participation based on current GMP (June 2020):

Current GMP Forecast	Projected Participation
\$168,664,007	\$20,110,450
<b>Current Participation</b>	<b>11.92%</b>



## IMPLEMENTATION

- Opportunities Not Realized
  - Apollo - Samsung VRF system not selected (\$1M)
  - Apollo – Plumbing trade partner (\$973,000)
  - Northstar - Demolition 2<sup>nd</sup> tier trucking lost due to value engineering (\$200K)
  - Whitaker Ellis – Shotcrete tier subcontractor (\$600K)
  - L&M Steel Fab – Schedule constraints impacted participation.
  - EC Company – A/V subcontractor (\$200K)
- Areas of Success
  - Fortis was able to award the full doors/frames/hardware package to a certified firm essentially doubling initial forecasted participation
  - EC Company has increased participation by \$1.2M
  - Konell has increased participation by \$300K
  - PMG – Only direct award subcontractor. There were challenges out of the gate but our teams worked together closely to resolve and PMG completed their scope on schedule