Topic: RFQ Improvement
What information should WSU ask for in the RFQ's?

- Subconsultants would like opportunity to throw out ideas they might have. Idea of ½ page of freedom to do what you want and show off differentiators. A "Wild Card" portion of the RFQ
- Difficult to remove bias from proposals. Can "blind scoring" be implemented?
- A3 format doesn't do the RFQ process justice, especially on a large, complex project. We can't get everything we want to convey – that we feel are our differentiators- in the space you provide. Need 10-20-page proposals for a significant process.
- Too much requested information in the A3.
- Two pages is not enough, twenty pages is too much, +/- 5 pages is ideal length.
- In A3 format, you get the same amount of questions to address in a regular format versus when there are more pages.
- With A3 it becomes just a marketing exercise. Get answers on the page in a super condensed form.
- If it takes 30 pages to ask the questions, why do I only get one page to respond?
- A3 for RFQ but allow longer responses in RFP.
- Opportunity to lean into the project approach.
    - WSU should focus specifically on the applicant's team members and makeup
- Two pages is not enough, twenty pages is too much, +/- 5 pages is ideal length.
    - Winners demonstrate clear knowledge of the problem the project is seeking resolution for.
    - Winners demonstrate their ability to solve and offer resolution.
- Consensus: not enough room in the present response form – reduce the number of questions, or increase the space
- Get to the "why" of team selection
- RFP responses should be based on proprietary meeting / project kick-off / chemistry test
- Today everyone can get copies of everyone else's responses to see what scores well and what doesn't (not to mention the AI machine). Put more emphasis / scoring on bringing the team members together in person and allow them to be creative. See how we match or don't. In person will tell you more about what you really want to know. (How we will work with you).
- Give Team's enough time to respond to the RFP after the proprietary meeting.
- Important to ask, "Why this team?". Not just, "Why this person?"
- Maybe ask, "What is your Vision, Innovation, Opportunity?" Maybe someone has a good idea that gets them to the table.
- Maybe ask, "What is the most critical discipline for success?"
- Maybe ask, "What are the most critical risk drivers?"
- The more information asked of / provided to the teams, the closer the responses may be to each other. But too vague will not work well for small businesses
- Suggest mandatory Pre RFQ/P site walk. Allows people to meet in person and get a sense of chemistry. Offer a few meeting times that make work well for most people.
- Can you ask for a Case Study that has relevant questions/pertinent information for the specific project?
- Project roles & structure currently too defined by RFQ language. Constrains team structure and limits ability to showcase differentiators. (i.e. only show Prime. Some primes have in-house services while others need a consultant. This skews the equation towards larger Primes…especially when users are a big part of scoring)
- Questions seem similar and are not clear in their intention (three questions asking the same thing in a different way)

- Safety? Keep it separate from the content of response.
- Asking for similar projects is too vague – tell us about a project that you think relates and why?
- "How can you leverage strengths of the team on this project" instead of " tell us about 3 similar projects"
- "Why did you assemble this team" instead of "tell us your experience".
- Standard/required info on a separate page (keep consolidated). Then describe the project, list the most important/interesting aspect of the project, and ask them to respond to those.
- The response criteria contains a level of redundancy. With the amount of available real estate on the A3, it would be helpful to have some efficiency here where we aren't answering multiple questions in multiple places.
- Costing/budgeting section seems to be a redundant/repetitive section – *I did not get specifics for this comment
- Can we have the resumes be the designated location for the team experience as well as individual to free up space for project specific responses
- Add a page that is unique to the project, tailor questions to the project scope
- include information from the users about goals/aspirations that will make the project successful
- Opportunity to lean into the project approach.
- WSU should focus specifically on the applicant's team members and makeup
- Winners demonstrate clear knowledge of the problem the project is seeking resolution for.
- Winners demonstrate their ability to solve and offer resolution.
- Get to the "why" of team selection.
- Present the RFQ/P with open format for responses to be more creative with team structures/project approaches
- Shorten normal questions and expand ways.
- Pre-qualification checklist, fewer questions.
- Why did you put the team together? Score on Why instead of experience together.
- What are the greatest risks?
- Demonstrate dynamic with the Q? Presented versus SOQ.
- Make more vague to create more delta.
- Using the pre-bid site walk as a pre-rfq meeting.
- Story – example of team or project.
- What is a key differentiator? Leave part open
- Each question has one of the three following: Decipher, make thin, or mysterious
- Hard to show team dynamic in written form.
- Maybe a 2-minute video to include with the Q? (Would this hurt some businesses that don't have the same resources?)
- What are the committee members looking for or thinking about in their review?
- Question to ask…why is the team interested in this project? What experience or passion connects you to this project?
- Need a chance to tell stories, show creativity
- Don't:
  - Boilerplate stuff that has to be done, remove them to separate documents - supplemental
  - Teaming agreement – why?
    - Ask for it as a separate document, make it supplemental

        - Use the A3 for differential content
    - Contractor's licenses, bonding, etc.
    - Stay away from pass-fail requirements in the A3s
- More approach questions
    - What's the most important discipline to solve the project challenges?
        - How to address them
            - By the time trade partner and consultants are selected, so many conversations have happened and those partners have missed them – hire the rest of the team faster
        - In the RFQ – what is your plan to bring for bringing the rest of the team on immediately?
    - Greatest challenges and how to address them?
- More project-specific for the project type
    - Provides client different views of solving the particular challenges
    - Questions to engage all team members, not just the GC and lead architect
    - Introduce case studies of how challenges have been addressed before and how they apply to this project?
    - Client PMs are concerned about what is the least risk for them – ultimately they pick the team they are most comfortable with.
        - This can reduce the ability for new teams/partners to get selected
            - How does WSU manage the risk of new partners/people with the desire to have new members
            - Based upon Joe's comment, it appears that it may be desirable for certain projects but not the really big ones
    - Can there be an intermediate step between the A3 and the shortlist?
        - Something other than the new phone call option
            - That is a lot of pressure on the one person receiving the phone call
- Demonstrate dynamic with Q? Presented vs. written SOQ.
- Pre-send questions to Owner.
- Use the Pre-Bid site walk as a pre-RFQ Meeting?
- Ask questions about specific project concerns
- Identify high risk items in the RFQ/P
- Present the RFQ/P with open format for responses to be more creative with team structures/project approaches
- Add one or two more A3 sheets to allow room for more elaboration/open ended questions
- Subconsultants would like opportunity to throw out ideas they might have. Idea of ½ page of freedom to do what you want and show off differentiators. A "Wild Card" portion of the RFQ
- Difficult to remove bias from proposals. Can "blind scoring" be implemented?
- We don't know who we're speaking to as we write. Are we writing to researchers, etc.? Changes what/how we write.
- It's difficult to know who's opinion on the committee "weighs" more during the scoring process.
- Can you ask for a Case Study that has relevant questions/pertinent information for the specific project?
- Project roles & structure currently too defined by RFQ language. Constrains team structure and limits ability to showcase differentiators. (i.e. only show Prime. Some

primes have in-house services while others need a consultant. This skews the equation towards larger Primes…especially when users are a big part of scoring)

- What should we spend more time on?
- Currently guessing
- What is your vision for the project/ building?
- Broad question could be a differentiator
- Prime contractors use five pages for sub selection
- Exhausting for design professional and the review team
- Suggestion: an interview before RFP
    - Teams will be forced to work together before the RFP
    - Cost to compete???
    - Teams present instead of reading all of them
- RFP- have the team problem solve. How do they work together
- Teams want the project goals, more information
- All about relationships versus qualifications
- Ask for non-owner projects.
- Ask a question about best example instead of three examples.
- Most important goals to the least important
    - Show example of how we reached the goals
    - Tell teams the approach
    - Focus on qualitative
- Interview –
    - Stay away from rehearsed interview
    - Really want to know how they interact and collaborate.
- Ask for strategies of how to deal with the project goals.
- What is your innovative idea for a specific project to meet or exceed the primary goals?
- Idea – have a proprietary meeting with the shortlist that allows the proposers to interview the Owner team to extract the project priorities.
    - Would allow them to get more prepared
- Maybe have the teams do a pre-recorded presentation to see how they collaborate together.
- Focus on philosophy for maintaining relationships and encouraging excitement/team building during the project.
- Teams should highlight specific case studies that are similar and help reinforce answers to each question. Can we allow a 3rd A3 page for just case studies?
- Questions should focus more on the proposed project team members and less on the company.
- Develop a prequalification program to cover the basic RCW questions/requirements.
- Allow a “Youtube” video submission instead of written paperwork.

Topic: RFQ Improvement

AI - Should we allow this? Should we require it to be disclosed?

- Mixed views
- Some have been using AI to take spoken responses to the questions and turn them into written responses.
- Some use AI to take every prior RFQ/P response and turn it into a new response.
- It’s a big time saver
- It’s another tool, gives you a starting point
- Difficult to police. Is it making things more fair or less?

- Free form, open questions would be more difficult for the AI machine to respond to. Maybe?
- Boilerplate questions = boilerplate responses
- “Fairness has created sameness”
- An equal process does not allow for innovation and creativity
- AI can lie
- How do we get at a more human response? There needs to be more in-person interaction.
- Include a unique identifier question as a differentiator
    - Maybe 4 questions, have teams choose 1 and answer it?
- AI reduces cost for response and level sets.
- AI is the analyst and human is the strategist
- There is a bias regardless of AI or not
- Maybe ask, “How is your team going to leverage AI to save WSU time and money?” How can it improve the process for everybody
- Depends on how you use it; junk in, junk out
- Just a tool
- If it is truly all about the people and process. Using AI makes it harder to understand this
- AI does not help us answer the toughest project questions, like which decision will be best for the project
- How can we get more quickly to face to face relationship building
- Concern about programmatic users being too swayed in reviewing proposals when they use AI
- Discussion about blind scoring. But HOW do you do it?
- AI might push you to trust in-person experiences more than written impressions. You can tell who you’re getting and it’s tougher to fake it. At what stage is the written portion of the process irrelevant in picking a team (because of AIs influence)?
- AI as the analyst, humans as strategists.
- It’s a level setter. Small company versus large company
    - Large companies marketing groups already use pre-made copy. Small Companies use AI, whats the difference?
- Mostly used to condense/edit write up, not create 100% of the content. Important for A3.
- Ask: “How will your team use AI to save WSU money on this project?”
- Support FOR utilizing AI for the applications, maybe require a disclosure statement whether AI was used or not.
- AI is an inevitability; table is stressing the importance of enabling the use of the best tools available (AI).
- AI increases the volume of the “Garbage In Garbage Out” problem of all software.
- AI increases the need for in-person “meet the team” vendor selection (harder to bullshit applications with AI)
- AI represents a potential opportunity for Facilities Services to streamline various processes and increase resource efficiencies with paperwork and records keeping.
- AI can destroy creativity in the DB team
- Depending of the level of AI use, it could be beneficial. The table identified two approaches
- Start with an AI “template” and the expand on it to make it your own
- Start with your own written response and use AI to refine it.
- AI can be a tool for small businesses without a marketing team to polish their responses and supplement that lack of marketing experience.

- If you use AI, you still need to provide your teams content in the response. AI cannot provide your team's unique traits and skills
- Asking questions from the Q/P in the interview can help weed out teams that only used AI. If the team is able to give decent responses in the interview, it shows they may have been more involved in the Q/P drafting.
- Maybe don't do proposals and instead do only interviews.
- AI is analysist and human is strategist.
- WSU as "Global Thought Center"
- Speed Dating
- How much AI is used?
- No proposals – all interviews.
- Short turn around between selection to interview eliminates AI Integration and AI Graphics.
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- AI… embrace it… we are just at the beginning… it's inevitable… instead of fearing it, embrace it
- May make a team look better than they are
- It's not consistent, could misrepresent
- Does it potentially waste WSU's time?
- Policing a waste of time
- Loose the personal aspect
- AI skills may become a selling point
    - marketing component
    - if your not able to use it effectively you will fall behind
- Move the meet the team up to avoid false perspective of teams from AI content
    - Reducing the costs for teams and may level the playing field for smaller businesses
- How it is used matters
- AI cannot be original
- Use to compare submittals to specs and standards.
- If not properly vetted, it could create risk that the whole project will eventually have to deal with.
- Yes, because it can help someone like a superintendent put their experience on paper.

Topic: Prompt Pay
How can we better support prompt pay and reach sub tiers?

- What are WSU's handcuffs? How can pay apps be paid faster so subs can be paid faster? (It sounds like this may vary depending on the project.)
- People like the idea of the "escrow account" – Let's figure that out
- Joint checks doesn't work when accounting systems are sluggish, like when checks need to be cut in NJ. Joint checks requires contracts and red tape that makes it not work smoothly. Checks don't get cut everyday.
- Recommend adding additional pay apps in each month. This would need additional staff / time to help process.
- How could lower tier subs pre-purchase material and get paid it? Allow this exception in the contract. Currently too many stipulations.
- Small businesses could still be large contracts. Maybe limit to truly small businesses with small contracts.
- Develop a plan and ask people to apply for it. Ask subs what they need and why,
- Set up special loan program to cover costs
- Sub default insurance; Another tool that allows contractors to be more amenable because it helps mitigate the risk.
- Subs that take the job but can't afford to, shouldn't be going after the work.
- Can WSU buy materials? Not for anything over 10k.
- Approach could drive increased fees. "If you pay a fee, we can pay you whenever you want."
- For subcontractors, it is easy to get invoices but it is harder to go through the prevailing wage and letter of intent process successfully to actually pay them. There is an education piece that needs to occur so they can get paid as quickly as possible or their ability to complete the paperwork can be the hold up.
- You can't streamline and speed up a process without being able to remove some required steps.
- Problem with Compliance – Prevailing Wage.
- Q-how was the financial health vetted for the experiment with lower tier subs?
    - There would need to be an approved method for properly vetting the financial health of the sub before enrolling them in an advanced prompt-pay scheme
    - Perhaps look at advancing funds to GC for a pool of money to pay low-tier subs that need prompter payments than.
        - It is a red flag if a sub/business is needing the financial assistance for this scenario because it suggests the business does not practice good business financial practices for growth (Hensel Phelps)
        - Rebuttal: to help owner with prompt pay, payapps need to be more structured and easier to verify compliance.
- Labor accrual is a bigger risk than material.
- Table consensus is that state agencies, including WSU, are not the problem when it comes to Prompt Pay. Table members brainstormed software solutions for private industry prompt pay problems.
- Early pay/ "escrow account" could be a line item in the SOV that is paid early to the contractor, then dispersed to sub-tier consultants and contractors as necessary.
- Contract language will need to be changed if this is a payment from the owner.
- Nth level subs do not have a direct contract with the owner, so getting the payment quickly down the chain will be difficult without a direct contract.
- Create a parallel, fast tracked pay app system for lower tier subs?
- Joint checking.

- LNI release process
- Coordinated invoice reviews? Streamline processes.
- Streamline contract setups vertically to avoid contract issues or invoice issues.
- Accounting website? Invoice status?
- Keep the prime cash positive
- Contract terms related to payment of subtiers needs to be reviewed.
- Clear substantiation requirements for Subtiers
- Conversation is good, rather than cycles of revision and rejection.
- Converting the contractors' SOV to the Owner's form is clunky
- Allowance for interest on late payments.
- Don't want to weaponize retainage.
- Risk Register – add a line item to cover.
- Financing could be applied for those who need it.
- Could Procore be utilized to streamline payment processing?
- Create a parallel, fast tracked pay app system for lower tier subs?
- For subcontractors, it is easy to get invoices but it is harder to go through the prevailing wage and letter of intent process successfully to actually pay them. There is an education piece that needs to occur so they can get paid as quickly as possible or their ability to complete the paperwork can be the hold up.
- You can't streamline and speed up a process without being able to remove some required steps.
- Don't do the 60/40 approach
- One of the subcontractors disagreed with the special process for small businesses.
- How much is interest that should be set aside to pay?
- Have an allowance set aside on the owner's side to pay late payments.
- Some companies at my table offer "advanced payment plans", but they come with a fee.
- Create an application process specific to the project to help determine which subs would benefit most from an escrow-type line item.

Topic: Cost of the Work, Soft Cost, DB Fee
Is there a better cost component to look at than DB Fee?

- Everyone does their fee differently
- Teams need better understanding of what the cost of the work is – They need to read the contract.
- Yes, need more level setting of how people put their fees together.
- Talk more about the cost of the work in the pre-meetings. Make sure they know to read the contract
- Compared to the total cost of the project the fee is the cheapest part of the job. Schedule length is a bigger differentiator / influencer on the total cost of the project.
- How can the SOV be more standardized? May need to request more back-up to better understand what some people put into their SOV
- Pull audits in earlier to work through all the kinks on SOV / Pay Apps
- Create standardized template for
    - Cost of Work
    - General Conditions
    - Fee

- UW's process is overly directive, and it is an onerous process. It's all hourly and calculated on time and rates. Very intrusive and time intensive to propose on at UW.
- WSU's approach to lump sum is preferred.
- Cost of work is hard to delineate between General Conditions versus Overhead.
- WSU mentioned that having the DB rate has been a point of contention and confusion for some folks on the committee. WSU's process places heavy emphasis on the preference of the users (your client's) but you do so more than other institutions. It's our feeling that this type of information should only be viewed by WSU Facilities folks (not programmatic users) – they just don't know enough about the industry to add value to that conversation. Maybe there should be a portion of the SOQ that is only for Facilities (safety, fee, etc.) and other information (team, experience, etc.) is shared with the programmatic users. Take discussion of the number itself out of the "voting" equation completely.
- General Conditions – Different Owners do it differently as well in what they ask for.
- WSU should better define what they want to see in General Conditions. General Requirements – should also be better defined and some items could go in either bucket. GC's often move things between the two buckets so one doesn't look too large.
- Reviewed WSU's form in the discussion and was generally felt to work for DB teams on our end.
- How do you account for teams that come in very low on fee at the front and then rely on ability to add fee during the course of the project.
- Can you use two items to assess fee: General Conditions and DB fee (give a factor of importance to those two in your equation). This would minimize ability of teams to drive DB low and add to GC's.
- If you truly want a good DB team, fee should not be a deciding factor.
- Sometimes teams that know more about a project might include a high fee.
- Just list 'profit' only.
- WSU should have very clear and strict requirements when defining what the DB Fee is and isn't – to reduce the types of games vendors can play when competing around the DB fee.
- Grade the fee schedule after everything else in the proposal
- What can and cannot be included in the fee is laid out in the project manual. Enforcing strict adherence to the project manual can clear up confusion on differences in fees/scope of fees.
- OFM fee schedule control
- Low points on selection, then it really does not matter.
- UofO uses 6% and defines it.
- Cost factor as essay
- Cost of being transparent and substantiating costs.
- Protecting A/Es in DB.
- Fees can be misleading, who brings best value
- Separate fee/cost component to not bias selection.
- Compare against historical, or above/below, range.
- Compare insurance rates as the cost component.
- UW's process is overly directive, and it is an onerous process. It's all hourly and calculated on time and rates. Very intrusive and time intensive to propose on at UW.
    - WSU's approach to lump sum is preferred.
- Cost of work is hard to delineate between General Conditions versus Overhead.

- WSU mentioned that having the DB rate has been a point of contention and confusion for some folks on the committee. WSU's process places heavy emphasis on the preference of the users (your client's) but you do so more than other institutions. It's our feeling that this type of information should only be viewed by WSU Facilities folks (not programmatic users) – they just don't know enough about the industry to add value to that conversation. Maybe there should be a portion of the SOQ that is only for Facilities (safety, fee, etc.) and other information (team, experience, etc.) is shared with the programmatic users. Take discussion of the number itself out of the "voting" equation completely.
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- Can you use two items to access fee: General Conditions and DB fee (give a factor of importance to those two in your equation). This would minimize ability of teams to drive DB low and add to GC's.
- If you truly want a good DB team, fee should not be a deciding factor.
- Pass or fail
- You could ask for labor rates for design and construction
- A schedule may provide context to the general conditions
- Private sector, owner dictates the fee
- WSU can't change the fee after
- Open the fee after the selection process so there is not a bias
- Take the percent of all except direct construction costs, all other costs
- Make sure design fees include all design
    - Identify in the RFP where you are going to use trade partners for design versus a design sub-consultants.
- Can we eliminate sales tax on design and professional services?
- WSU could state an expected fee % and then the DB team would need to explain why they are higher or lower.

** these notes do not include duplicative comments if they were the same in different note locations.