

SELLING ARCHITECTURE, ENGINEERING AND CONSTRUCTION TO THE STATE OF WISCONSIN

WISCONSIN SUPPLIER DIVERSITY PROGRAM

DIVISION OF FACILITIES DEVELOPMENT AND MANAGEMENT





TONDRA DAVIS DIRECTOR, WI SUPPLIER DIVERSITY PROGRAM



Audra Jervey serves as a DOA Enterprise Contract Officer. She works in the Bureau of Capital Budget & Construction Administration within the Division of Facilities Development and Management (DFDM). Although a 5-year veteran with the state, she has served in this role for 3 years.



Matt Klaila is a Program and Policy Analyst with DOA's Division of Facilities Development and Management. Matt has served the state of Wisconsin in this role for 7 years.



AGENDA

- **Architecture and Engineering (A/E)**
 - Locating A/E Opportunities.
 - Securing A/E Opportunities.
 - Managing A/E Opportunities.
- **Construction**
 - Locating Construction Opportunities.
 - Securing Construction Opportunities.
 - Managing Construction Opportunities.

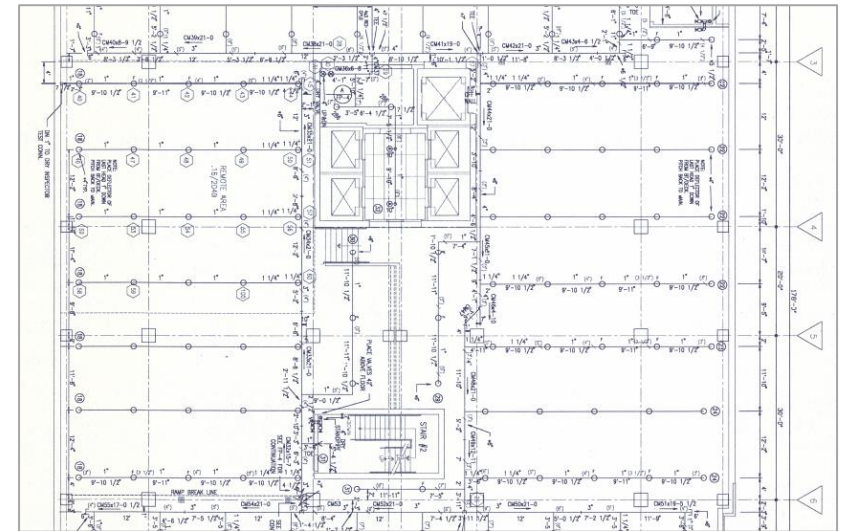


LOCATING ARCHITECTURE AND ENGINEERING OPPORTUNITIES



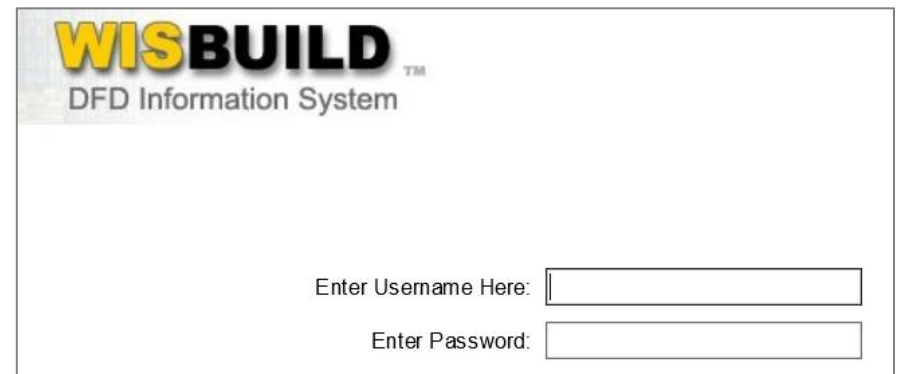
QUALIFICATIONS

- No DFDM certification required
- Must meet professional license requirements per the Department of Safety and Professional Services:
 - <https://dsps.wi.gov/Pages/Professions/Default.aspx>



WISBUILD

- Online project management tool
- Used by staff, architects, engineers, and contractors working on State building projects
- Registration required for access
 - Email: doawisbuild@wisconsin.gov to register



The screenshot shows the WISBUILD login page. At the top left, the logo reads "WISBUILD™" in bold yellow and black text, with "DFD Information System" in smaller black text below it. The main area of the page is white. On the right side, there are two input fields. The first is labeled "Enter Username Here:" and the second is labeled "Enter Password:". Both labels are in a small, grey font.



WISBUILD A/E FUNCTIONALITY

- Upload project qualification submissions
 - https://doa.wi.gov/Pages/DoingBusiness/AE_Selection.aspx
- Access and maintain A/E Data Record
 - Firm Contacts
 - Liability Insurance
 - Fee Rate Sheets
 - Optional Attachments

Architect/Engineer Data Record for Audra the Engineer & Associates, Inc. 9/9/2016

Basic Data			
Year Established	1932	Phone Number	(608) 608-6080
Address1	520 W. 13th Street		
Address2			
City	Pleasanton		
Organization:	Sole Owner	Corporation	Yes LLC Association
Principals of Firm: Audra Jervey			
DFD Contact Person	Jervey, Audra	Email Address	
This person will receive communication from DFD and will be the primary liaison project issues.			
Professional Liability Insurance Data			
Insurance Carrier	Pretty Good Insurance		
Amount\$	100,000		
Staff At This Office			
1	Architects	0	Registered Surveyors
4	Structural Engineers	2	Designers
2	Civil Engineers	0	Drafters/CAD Operators
0	Mechanical Engineers	1	Planners
0	Electrical Engineers	0	Landscape Architects
Services Offered			
<input checked="" type="checkbox"/> Provide services for projects with overall value less than \$150,000. Present Fee Schedule is: Fee_Rate_2016.pdf (uploaded on 9/9/2016 4:41:45 PM)			

Name:	Audra the Engineer & Associates, Inc. (Please submit a WisBuild Help Desk ticket to request c
Address:	520 W. 13th Street Pleasanton, WI 12345
Phone:	(608) 608-6080
Fax:	() -
Email:	
Web Site:	
Contacts:	Jervey, Audra - Architects/Engineer
InActive?	No
Last Updated By:	Audra Jervey

[Add New Contact to Your Own Firm](#)
[A/E Data Record](#)
[Contract Status Report](#)
(Report will open in a new window)
[Performance Scoring](#)

WISBUILD

0 Construction Admin.

WISBUILD A/E FUNCTIONALITY

- View Current Evaluation Scores
 - Assessment of completed documents at different project stages
- View Current Status Points
 - Measure of current DFDM project workload based on contract quantities and amounts

PM Reviews					
Braun-Oddo Lois	Bloechl-Anderson Peter	Arch. Plans	4/4/2017	63%	
Kirchstein Bill	Kirchstein Bill	Roofing	8/27/2018	57%	
Kirchstein Bill	Kirchstein Bill	Roofing	9/14/2018	75%	
Kirchstein Bill	Kirchstein Bill	Roofing	11/5/2018	65%	
Dapp Matthew	Quilling Evan	Arch. Plans	7/2/2019	77%	
Dapp Matthew	Quilling Evan	Arch. Plans	7/2/2019	77%	

Summary		
Summary	Quantity	Total Value
Design Contracts	6	\$92,279.00
Design Change Orders	0	\$0.00
Design COs \$ as % of Design Contracts		0.00%
Construction Contracts		\$629,175.00
Construction Change Orders		\$49,339.52
Construction COs \$ as % of Construction Contracts		7.84%
Total Design Cost as % of Total Construction Cost		13.60%
Status Points		0.27



WISBUILD A/E FUNCTIONALITY

- Process Pay Requests
- Process Change Orders
- Communication Tool

In Basket

Send and Retrieve Messages.

You have 17 items in your in basket.

Project Selection Screen

- Project Overview
- Project Contacts
- View Project Activities
- Project Tracking

View/Modify Company Information

- Update Firm Information
- Enter/Edit A/E Data Record
- Edit or Add Contact Information
- Contract Status Report

Miscellaneous Utilities

- [Submit Help Desk Ticket](#)
- [View Your Help Desk Tickets](#)

#	Change Item	Amount	Reason
1.	SE design for new boilers in lieu of refurbished boilers	\$45,000.00	Minor Scope Changes
	The amount of the Contract will be increased by the sum of	<u>\$45,000.00</u>	
	The amount of the Original Contract plus Change Orders to date	\$325,270.00	
	Contract total including this Design Change Order will be	\$370,270.00	

Item (Click on item for more detail)	Contract Value	Previously Submitted	Payment This Invoice	Total Paid To Date	Balance to Complete	% Complete (Fee)
Close-Out Submittals (Withheld Amount): O & M, Building Inventory, Asbuilts						
Base Contract (Plus Change Orders)	\$77,450.00	\$0.00	\$21,900.00	\$21,900.00	\$55,550.00	28.28%
Approved Change Orders (SUM):	\$0.00	---	---	---	---	---
Reimbursable Expenses:	---	\$0.00	\$0.00	\$0.00	---	---
Totals:	\$77,450.00	\$0.00	\$21,900.00	\$21,900.00	\$55,550.00	28.28%

The request for payment was approved.

DFDM A/E PROJECTS

- Small Projects: up to **\$300,000**
- Monthly Projects: **\$300,000 - \$7.4M**
- Major Projects: over **\$7.4M**



MONTHLY A/E PROJECTS

- **\$300,000 - \$7.4 million**
- **Project Types**
 - Classroom renovations
 - Mechanical system repairs/upgrades
 - Building expansions



MAJOR A/E PROJECTS

- Over **\$7.4 million**
- Project Types
 - New building construction
 - Large scale renovations and additions
 - Utility and mechanical expansions



SECURING ARCHITECTURE AND ENGINEERING OPPORTUNITIES



SMALL PROJECT SELECTION

- Delegated Selection
 - Chosen by Agency and Project Manager
- Selection Considerations:
 - Prior experience
 - Current DFDM workload
 - Office location
- Typically one firm with no sub-consultants



MONTHLY PROJECT SELECTION

- Selection Process
 - Letter of Interest submission
 - DFDM Selection Committee makes recommendation
- Often prime firm with sub-consultants
- Monthly Project A/E service requests posted to DFDM website in batches once a month:

https://doa.wi.gov/Pages/DoingBusiness/AE_Selection.aspx



Small Projects - \$300,000 or Less

In order to be considered for projects under \$300,000, the A/E must indicate interest in small projects in their A/E data record and upload a [Consultant Fee Schedule](#).

Monthly Selection - \$300,000 to \$7.4 Million

- Current A/E Selection Opportunities - Under \$7.4 Million
- [Instructions for Uploading a Letter of Interest](#)
- A/E Solicitation Results - Under \$7.4 Million

Major Project Selection - \$7.4 Million and Above

- Current A/E Selection Opportunities and Results - \$7.4 Million and Above



MAJOR PROJECT SELECTION

- Selection Process
 - Request for A/E Services posted to DFDM website
 - Formal submission and interview process
 - DFDM Selection Committee
 - Holds Screening Meeting to narrow down submissions
 - 3 – 4 firms typically invited to formally interview

Small Projects - \$300,000 or Less

In order to be considered for projects under \$300,000, the A/E must indicate interest in small projects in their A/E data record and upload a [Consultant Fee Schedule](#).

Monthly Selection - \$300,000 to \$7.4 Million

- Current A/E Selection Opportunities - Under \$7.4 Million
- [Instructions for Uploading a Letter of Interest](#)
- A/E Solicitation Results - Under \$7.4 Million

Major Project Selection - \$7.4 Million and Above

- Current A/E Selection Opportunities and Results - \$7.4 Million and Above



MAJOR PROJECT SELECTION CONT.

- Selection Considerations
 - Strength of team
 - Demonstration of past experience
 - Evaluation scores
 - Current DFDM project workload
 - Office locations
- Always prime firm(s) and sub-consultants



DIVERSE SUPPLIER INVOLVEMENT

- Diverse Spend Goals per Wis. Stats. §. 16.855 (10m) (am) 3
 - 5% - MBEs
 - 1% - DVBs
 - No goal currently for WBEs
- DFDM requests firms responding to A/E invitations include:
 - Certified Diverse suppliers on design team
 - 5% of Contracted Fee for MBEs
 - 1% of Contracted Fee for DVBs
 - No goal currently for WBEs



2019 DIVERSE SPEND

- Total value of all A/E contracts = \$53,673,414
- Total value of all MBE A/E contracts = \$1,605,655
 - MBE participation = 2.99%
- Total value of all DVB A/E contracts = \$232,300
 - DVB participation = 0.43%



COMMUNICATION

Interested A/Es are encouraged to make an appointment to visit and talk with facility staff at the various agencies, campuses, and DFDM staff in your area of expertise.



MANAGING ARCHITECTURE AND ENGINEERING OPPORTUNITIES



CONTRACTING PROCESS

- Selected firm receives notification letter via email
- Kick off meeting scheduled to establish:
 - Project scope
 - Project schedule
 - Project budget
- DFDM executes contract
 - ~ 30 days after receipt of final proposal from A/E



BEST PRACTICES TO STRATEGIZE AND PURSUE PROJECTS

- Express interest and be persistent
- Get to know agencies, institutions, and the DFDM PMs in your area of expertise
- Understand your strengths and weaknesses and set realistic expectations
- Monitor evaluation scores and points
- Be proactive in addressing concerns
- Perform well on projects!



LOCATING CONSTRUCTION OPPORTUNITIES



QUALIFICATIONS – CONTRACTOR CERTIFICATION

- State Projects over \$50,000 (1/1/14)
- Application:
 - DOA Projects Out for Bid Page:
[https://wisbuildnet.doa.state.wi.us/\(S\(m01dzehmslyjhpp3behpg1eo\)\)/public/bidlist_public.aspx](https://wisbuildnet.doa.state.wi.us/(S(m01dzehmslyjhpp3behpg1eo))/public/bidlist_public.aspx)
 - Email: DFDCertification@wisconsin.gov
- Common Errors
- Approval – Qualified, Responsible Bidder
- 2-year certification



WHO NEEDS TO BE CERTIFIED?

- Contractors bidding directly on construction projects over \$50,000
- Those Bidding on Specific Divisions of Work
 - Fire Protection (Div. 21)
 - Plumbing (Div. 22)
 - Mechanical (Div. 23)
 - Electrical (Div. 26 27 & 28)
 - Roofing and Asbestos Abatement
- All General Prime Contractors
- Second-tier subcontractors who do **not bid directly** to the state are **not** required to be certified.



SECURING CONSTRUCTION OPPORTUNITIES



WISBUILD FOR CONTRACTORS

- All contractors encouraged to obtain WisBuild account, regardless of certification requirements.
- Obtain WisBuild Account:
 - DOA Projects Out for Bid
page: [https://wisbuildnet.doa.state.wi.us/\(S\(m01dzehmslyjhpp3behpq1eo\)\)/public/bidlist_public.aspx](https://wisbuildnet.doa.state.wi.us/(S(m01dzehmslyjhpp3behpq1eo))/public/bidlist_public.aspx)
 - Email - DOADFDAdminServices@wisconsin.gov



WISBUILD CONSTRUCTION FUNCTIONALITY

- Access plans and specifications
- Appear on project plan holder lists
- View your current contractor certification status
- Process contracts, submittals and pay requests
- Communicate with project managers, construction reps and administrative staff



DFDM CONSTRUCTION PROJECT CODES

- MEP = Mechanical, Electrical, Plumbing & Fire Protection
- GPC = General Prime Contractor
- AAC = Asbestos Abatement Contractor
- STC = Single Trade Contractor (project is at least 85% Mechanical, Electrical, Plumbing or Fire Protection division of work)



PROPOSALS (SMALL PROJECT PROGRAM)

- Small Project - \$300,000 or less
 - Contractors submit their bid using their own selected subcontractors
- Projects greater than \$300,000 require Single Prime bidding and contracting



SINGLE PRIME BIDDING & CONTRACTING (PROCESS FOR PROJECTS OVER \$300,000)

MEP Bid Opening – 2 weeks later – GPC Bid Opening

MEP Bid Opening

- MEP Tabulations posted within 48 hours.
- MEP Identified 1-week later.
- MEP ID assigned.

GPC Bid Opening

- GPC uses MEP ID to submit bid.
- GPC Tabulations posted within 48 hours.
- Contract offered within 30 Day.
(lowest, qualified responsible bidder - certified)
 - Contract with GPC Only.
 - MEP's contract through GPC.



DIVERSE CONTRACTOR 5% BID PREFERENCE – DVB & MBE

Wis. Stats. §. 16.855 (10m) (am) 3

- Non-Diverse Bidder - **\$100**
- Diverse (MBE/DVB) Bidder - \$102, 5% preference makes bid **~\$97**.
- WI is a low bid state - **\$97** bid is selected for review.
 - Contractor Must be Qualified and Responsible or DFDM Certified Contractor.
 - Vetting process to ensure firm's capacity.
 - All checks out, diverse supplier awarded project.



2019 DIVERSE SPEND

- Total value of all construction contracts = \$400,494,482
- Total value of all MBE construction contracts = \$9,505,143
 - MBE participation = 2.37%
- Total value of all DVB construction contracts = \$1,115,997
 - DVB participation = 0.28%



MANAGING CONSTRUCTION OPPORTUNITIES



MANAGING AWARDED CONTRACTS

- Return Contract

- Signed
- Completed

- Notice to Proceed – Usually within 1 week

- Project Specifications –

[https://wisbuildnet.doa.state.wi.us/\(S\(m01dzehmslyjhpp3behpg1eo\)\)/public/bidlist_public.aspx](https://wisbuildnet.doa.state.wi.us/(S(m01dzehmslyjhpp3behpg1eo))/public/bidlist_public.aspx)

- Compliance
- Requirements



WI SUPPLIER DIVERSITY PROGRAM

- Manages certifications – MBE, DVB & WBE
- Wisdp.wi.gov
 - Eligibility requirements
 - Application steps
 - Searchable directory of certified suppliers
- WiSDPWebApplication@wi.gov



QUESTIONS?