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Quality Projects.



# Winning Work: Proposals that Sell

- *Pre-proposal:* **Teri Jones**, Vice President of Business Development , Sundt Construction
- *Proposal:* **Al Grasso**, Director of Market and Client Strategy, Mascaro Construction Company
- *Joint Ventures:* **Dana Galvin Lancour**, Director of Communications, Barton Malow Co.



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# Pre-Proposal

Teri Jones

Vice President of Business  
Development

Sundt Construction

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# Go/No Go is an iterative process

- Does it fit our tactical plan?
- Who is the competition?
- What is our value proposition?

# Tactical Plan Fit

- Market
- Size
- Geography
- Delivery Method

# Client Meeting/Research

- Hot buttons
- Process for selection
- Culture
- Timing

# Condition the Opportunity

- Seeds of differentiation
- Help with the RFQ
- Meet w/ Stakeholders/Decision Makers
- Meet with Design Firm

# RFQ is issued: Go/No Go?

- Pros & Cons
- Validate process
- Evaluate the risk factors
- Competition analysis

# Tough Questions

- Available staff?
- What do we know about the competition?
- Is it “wired” for someone else?
- Can we win?
- Can we make money?
- Risk vs. reward



# Value Propositions

- What are they?
- How can we use them to our advantage?
- Obvious or not?

# The NO of Go/No Go

- Saying NO is hard to do!



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# Proposal

Al Grasso, Director of Market and Client Strategy, Mascaro Construction Company

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# It's a Go...Now What?

- Prepositioning efforts generate “hot buttons”
- You must communicate these in submittal
- But, how?
  - RFQ/P's ask for many, many items
  - Your audience is busy
  - They are each reading multiple submittals
  - Your differentiators can get lost

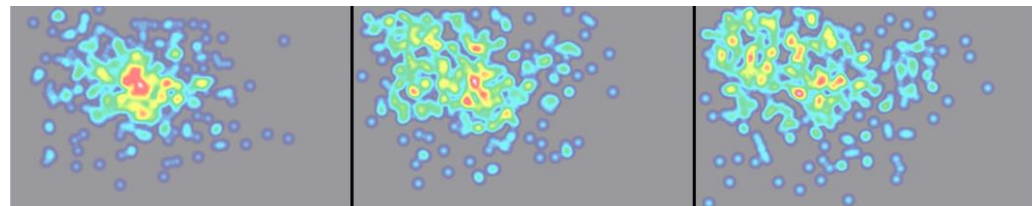
Don't make them work to find it

# How to Stand Out

- You must clearly communicate your competitive advantages
- You can't be nonresponsive
- How do you stand out?
  - Focused content
  - Enhanced layout
    - Graphics and pictures
    - Charts
    - Bulleted lists
    - Call out quote boxes

# Graphic Communication Principles

- Layout principles are out the window
  - Leads to more creativity...and more terrible layout
  - Some old principles are worth remembering
- Remember
  - Moderation
  - Consistency, simplicity, clarity
  - White space
  - Eye placement
  - $7 \pm 2$



- 4) Firm approach to successful completion of RMI project scope:
- a) If awarded the project you will be required to be a Key member of the IPD team. Briefly describe what you understand is your role as a Key IPD member and how you would approach the project.

## **PRECONSTRUCTION**

We believe that the success of any construction project begins in the preconstruction phase. The result of true teamwork is reliable information, smooth processes and high-quality construction. Our process requires solid contributions from each member of the team, which allows for high standards to be set and maintained. Our preconstruction approach sets the stage for a successful project by focusing on the following areas:

### **Collaboration**

The result of true teamwork is reliable information, smooth processes and high-quality construction. We require solid contributions from each member of the core team, which allows for high standards to be set toward the same main goals. We are able to provide information and feedback in a timely manner, facilitate team communication, and maintain your trust throughout the project.

### **Subcontractor Procurement**

Using our data bank of subcontractors and material suppliers, as well as others identified by the project team, we will match subcontractors to the determined bid categories. Qualification criteria of subcontractors will include reputation, understanding project complexity, and history of maintaining proposed cost and schedule. We will assemble a list of at least three qualified subcontractors/suppliers in each bid category for your review. The following outline describes our program:

### **Estimating**

We embrace a "Design-to-Budget" philosophy. In this approach, we work closely with the design team to deliver real time estimates as design progresses. The benefit of constant, real-time estimating is that the design team understands the cost implications of each iteration of design, and therefore can "design to budget" armed with accurate cost information. In addition to this, we also prepare formal cost estimates that we will present to the project team and key stakeholders at traditional design intervals.

To ensure the accuracy of our estimates, we utilize Revit (BIM), Onscreen Takeoff (OST) and MC2 to assist in accurately quantifying and detailing scope for our projects. The benefits of using these applications are provided to the project and ultimately the owner. Our systems allow us to complete our tasks more efficiently and focus our time and energy on the overall project goals. By creating electronic files, these systems also allow us to share project documents and information between team members for the expressed purpose of providing immediate resolutions to project challenges. This allows Owner access and encourages involvement by all team members without delaying the process.

## **SITE SUPERVISION**

The site construction of your project will be led by our superintendent. Supporting our superintendent will be assistant superintendents/field engineers (as necessary), our safety director, general superintendent, warehouse manager, and quality control personnel.

### **Scheduling**

The superintendent will manage the master schedule, which will offer a concise, easy-to-read map of the timeline of your project. The schedule activities are broken down into enough detail to serve as an accurate tracking tool but not so much detail as to become cumbersome to meaningful tracking. The objective of the master schedule is to provide a detailed roadmap to the on-schedule completion of the project.

We will also manage 2-4 week look-ahead schedules. This schedule, a smaller "cut-section" of the master schedule, is used to focus the team on the work to be completed in the short term.



- 4) Firm approach to successful completion of RMI project scope:
- If awarded the project you will be required to be a Key member of the IPD team. Briefly describe what you understand is your role as a Key IPD member and how you would approach the project.

## preconstruction

We believe that the success of any construction project begins in the preconstruction phase. The result of true teamwork is reliable information, smooth processes and high-quality construction. Our process requires solid contributions from each member of the team, which allows for high standards to be set and maintained. Our approach sets the stage for a successful project by focusing on the following areas:

- Collaboration
- Subcontractor procurement
- Estimating
- Value analysis
- Constructability reviews
- Scheduling and site logistics planning
- Establishing quality assurance plan
- Establishing site-specific safety plan
- Develop public communications plan
- Guaranteed maximum price



## site supervision

The true heart and soul of any construction project is led by the site superintendent. Quality, schedule, safety and communication are the keys of a successful project. Our on-site management provides:

- Your best interests are at the forefront
- Daily monitoring of the project site
- Daily safety supervision
- Daily tracking of schedules
- Coordinating of work flow
- Oversight of quality and performance
- On-site guidance to trade contractors
- Prompt and timely communication
- Leadership for daily, weekly and monthly meetings
- Strong site leadership maintaining site and team public relations



New Headquarters Building - Basalt, Colorado  
Qualifications for General Contracting Services  
- 12 -





## Doug Ortiz, Project Manager

### Roles and Responsibility

As Project Manager, Doug provides leadership and directs project management activities. Dan has been involved with various aspects of construction, including estimating, scheduling, project management and field management, for more than 34 years. He has been involved in all aspects of A&P's business operations for almost 17 years. On a project basis, Doug provides overall guidance and leadership. He will lend his expertise with complex, phased projects throughout the Denver metro region to this project to ensure success. Doug chief duties are to provide leadership and an additional level of commitment to each project, ensure that the resources necessary to meet expectations are provided, and monitor the preconstruction, construction and close-out phases of the project.

### Projects

Brown Palace Historic Occupied Renovations  
1670 Broadway Downtown Denver Occupied Renovations  
Kaiser Permanente Downtown Franklin Medical Campus Occupied Renovations  
Adams 12 The Studio School Renovations  
Douglas County Schools Coyote Creek Elementary Renovations  
Boulder Valley Emerald Elementary Renovations  
Adams 12 2007 Summer Renovations  
Adams 12 2008 Summer Renovations  
Adams 12 Northglenn High School Renovations  
Breckenridge Recreation Center Renovations  
Breckenridge Recreation Center Roof Replacement  
Denver Public Schools Vista Academy

### Education, Certifications and Memberships

B.S. Construction Management, University of Colorado  
Professional Training in Carpentry  
Professional Training in Safety  
Leadership Training - Rapport I Graduate  
Leadership Training - Rapport II Graduate  
Leadership Aurora Graduate  
LEED Accredited Professional  
OSHA 10-20-30 hour training

### Experience

34 years in construction project management, mechanical/electrical coordination and estimating, and almost 17 years with A&P.

### References

Todd Piccone, St. Vrain Valley School District, 303-123-4567  
Sandra Mutchler, Adams 14 District, 303-123-4567  
Dick Huwa, President, RLH Engineering, 303-123-4567

## 6.1 Project Staffing



**Doug Ortiz**  
Project Manager

### Roles and Responsibility

Doug will be the project lead and will be your day-to-day contact throughout the life of the project. He will:

- Facilitate all project planning meetings, work sessions and OAC's, from design/ pre-construction phase, through construction and closeout
- Understand and control the financial goals for your project, contracts, and budgets
- Ensure that the best interests of the project are always first and foremost

### Education, Certifications and Memberships

LEED Accredited Professional  
 Construction Management - University of Colorado  
 OSHA 30 Hour Certification  
 Carpentry Program Graduate, Association of General Contractors  
 Safety Awareness Certificate, Association of General Contractors  
 Leadership Aurora Graduate

### Experience

31 years of construction experience and 17 years with A&P

### References

Tom Anton, Suncor, 303-123-4567  
 Chris Sibilla, Intergroup, 303-123-4567  
 Brian Lamer, St. Vrain Valley School District, 303-123-4567

### Most Relevant Projects

#### Suncor USA Headquarters



- LEED Silver
- Similar scope: 76,000 sf office building
- ENR Best Office Project 2013
- Completed with the rest of our proposed project team

#### St. Vrain Red Hawk Elementary



- LEED Gold
- Similar scope: 71,000 sf building
- Located in Boulder County
- ENR Best K12 Project 2012

#### Kaiser Permanente Westminster Office



- Similar scope: 50,000 sf office building
- Occupied campus environment
- Completed with proposed Supt. Dave Gobbo

#### Adams City Learning Center



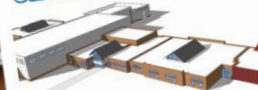
- Delivered Design-Build, in a highly collaborative environment
- Gold Hard Hat Winner for Best Collaboration
- 293,000 sf

#### APS Vista Peak Campus



- LEED Silver
- 216,000 sf
- Fully coordinated BIM utilized

#### Otis PK-12



- LEED Gold targeted
- 68,000 sf
- Fully coordinated BIM utilized

PROPOSAL - Sample Project  
Longmont, CO



## 6.1 Project Staffing

Diagram how this project team interacts with the design team and owner.

We want to be a part of your project TEAM. Our interactions with you and your design team will take a balanced, collaborative approach. The result of true teamwork is reliable information, smooth processes and high-quality construction. We expect solid contributions from each member of the core team, which allows for high standards to be set toward the same main goals.

### LISTEN AND UNDERSTAND

The first item to accomplish is to integrate into you team, and understand the process that you have already undertaken. We know that there is extensive expertise within the team you have already established, and when we can more thoroughly understand the reasons that key decisions have been made to this point we can apply this intent to future decision the team makes.

The result of true teamwork is reliable information, smooth processes and high-quality construction. At A&P, we require solid contributions from each member of the core team, which allows for high standards to be set toward the same main goals. A&P is able to provide information and feedback in a timely manner, facilitate team communication, and maintain your trust throughout the project.

### FACILITATE

This is what we do best. As construction managers, we are masters at maintaining schedule while allowing for ideas and innovation. We believe that our role is to facilitate communications, set expectations, and hold one another accountable. We have many processes and tools to accomplish this - techniques such as developing a team charter, and utilizing pull planning workshops.

A&P embraces a "Design-to-Budget" philosophy. In this approach, we work closely with the design team to deliver real time estimates as design progresses. The benefit of constant, real-time estimating is that the design team understands the cost implications of each iteration of design, and therefore can "design to budget" armed with accurate cost information.

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### EXECUTE

We follow through on our promises. Once the project has been set up for success in preconstruction/design, our construction team executes to exceed expectations. We do what we say we are going to do, when we say we are going to do it. Establishing trust and exceeding established quality, schedule and budget expectations is what ensures that we will deliver to you a 50-100 year building.

PROPOSAL - Sample Project  
Longmont, CO



## 6.1 Project Staffing

Diagram how this project team interacts with the design team and owner.

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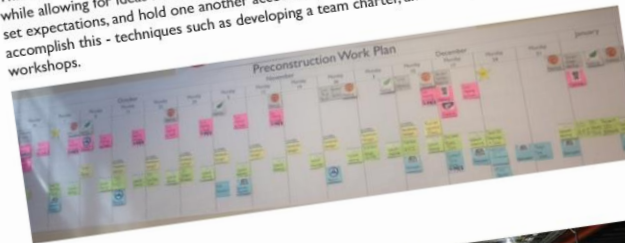
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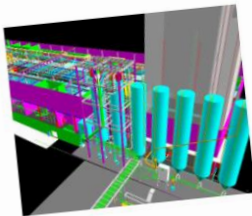


PROPOSAL - Sample Project  
Longmont, CO



## b. Team Information

iv) Provide a description of your firm's Experience with Building Information Modeling  
**Select experience utilizing virtual design and construction**



	Visualization	Prelim Mechanical	Prelim Structure	Clash Coordination	Panelization	Quality Control	Logistics	Safety	Schedule	Estimate	O&M's	Facility Management
Natrona High School												
Kaiser Permanente Lone Tree Medical Campus												
Wayzata Bay Redevelopment												
Garden City High School												
Forest Park Medical Center Phase III												
3M G3 Film Line												
Adams City High School												
Battle Mountain High School												
Missouri Ridge Apartments												
The Haven at Fortuna												
University of Wyoming College of Business												
New Belgium Brewing Asheville Brewery												
Forest Park Medical Center Southlake												
MSOP Moose Lake Correctional Institution												
Loring Park Apartment Building/Multi Family												
Manhattan High School												
APS Vista Peak High School												
MacArthur Park												
Veterans Home B16 and B17												
University of Minnesota NOVA Far Detector												
Colorado School of Mines Marquee Hall												
Veterans Home Nursing Home												
Casper College Student Union												
Johns Prairie Operations Center												
Rangely District Hospital												
Suncor USA Headquarters												
University of Minnesota Chiller Plant												
Normandale CC Academic Center												
Forest Park Medical Center Phase I												
CHC Alpine Campus												
Front Range Community College Larimer Campus												
Northwestern College Center												
Redmond Square Apartments												
University of Denver Ruffatto Hall												
Colorado School of Mines Marv Kay Stadium												
ASC Residence Hall												



# Last Thought

- Boilerplate
  - Some experts warn against it
  - Need to reinvent the wheel?
  - When to use
    - Use boilerplate process text when a construction process will show a benefit from being consistent and repeatable...then customize



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# Joint Ventures

Dana Galvin Lancour, Director of  
Communications, Barton Malow Co.



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Quality Projects.

**Barton**  
 **Malow**

**Insert  
Partner Logo  
HERE**

# Joint Ventures





# Joint Ventures



**Haselden**  
Construction, LLC

**Barton**  
■ **Malow**

**AMERICAN**<sup>2017</sup>  
**BUILDERS**

BRASFIELD & GORRIE | MORTENSON | BARTON MALOW | NEW SOUTH

**Barton**  
■ **Malow**



**BARTON MALOW HUNT WHITE**



# Joint Ventures

**ZACHRY**

**Safety**

- To always think of safety first in all that we do, and accept no compromises for our employees' and our customers' protection from danger

**Commitment**

- To be highly visible in our complete access of our employees, company, and to move agency and purpose.

**Trust**

**Integrity**

To always do what is right

**Service**

**communities**

**Economy**

- To protect the customer's and the company's resources as if they are our own, and always pursue a reasonable return.

**Skill**

- To do it right the first time, utilizing our vast collective knowledge and experience.

**Barton Malow**



OUR CORE PURPOSE

BUILDING with the AMERICAN SPIRIT:

**PEOPLE  
PROJECTS  
COMMUNITIES  
INTEGRITY**

**Making the right and fair decision**

**PARTNERSHIP**

**Building relationships based on trust and respect**

**EMPOWERMENT**

- Equipping and enabling people to deliver results
- Understanding expectations
- Acting decisively
- Demonstrating self-motivation and entrepreneurialism

progressive|ae

**Trust** integrity

- Earned from cowor for granted

**Working with a positive & Progressive attitude**

finding solutions, not problems

innovative ways, and having an entrepreneurial spirit

**Working in collaboration with others**

- About teamwork and team membership
- Critical for project success
- Proactive, open, sharing, non-territorial, challenging atmosphere of teamwork

**Leading through serving others**

- Servant leadership through listening, en
- en
- le:
- an

**community**

**Building Community**

- Building a strong and diverse community of Progressive employees and families; and strong communities within which we live and work

**Lifelong learning and personal betterment**

- Continual and self-driven pursuit of knowledge, personal improvement, advancement of skill sets, and professional development



# Joint Ventures



Adobe Indesign



Google Drive



# Joint Ventures

TASK	PERSON RESPONSIBLE	DUE DATE	DATE RECEIVED
Create Presentation Template	Scott B.	8/6	8/6
Create Testamonal CD Graphics	Scott B.	8/6	8/6
Create Presentation Outline	Sheryl M.	8/6	8/6
Create Mock Website Graphics	Scott B.	8/7	8/7
Reserve A/V Equipment (Speakers & Projector)	Mary Ann B.	8/8	
Create Leave Behind Template	Dana G./Jenna M.	8/8	8/8
Create BIM Model	Daniel S.	8/10	
Write Leave Behind Text	Sheryl M./ Donna J.	8/10/2007 @ Noon	8/8
Create Les Snyder Presentation Graphics	Sheryl M.	8/9/2007 @ 5pm	8/9
Create Len Moser Presentation Graphics	Lauren M.	8/9/2007 @ 2pm	
Create Cheryl Bowlson Presentation Graphics	Dana G./Marisa N.	8/9/2007 @ Noon	8/8
Create Andy Beamon Presentation Graphics	Andy B./Doug G./Marisa N.	8/9/2007 @ 2pm	8/9
Create Mike Roarty Presentation Graphics	Mary Ann B.	8/10/2007 @ Noon	
Create Harvey Oliva Presentation Graphics (BIM Model)	Daniel S./Dana G.	8/10/2007 @ Noon	
Create/Edit Owner Testamonal Videos (3 Minutes MAX.)	Scott B.	8/10/2007 @ Noon	
Create Jack Mascaro Presentation Graphics	Mary Ann B.	8/10/2007 @ Noon	
Send Leave Behind for Team Review	Dana G./Jenna M.	8/10@ 5pm	
Burn/Create Testamonal CD's (10 Copies)	Scott B.	8/13 @ Noon	
Send Comments on Leave Behind to Dana G.	All	8/13 @ Noon	
Send Presentation Slides for Team Review	Dana G.	8/13 @ 2pm	
Send Comments on Slides to Dana G.	All	8/14 @ Noon!	
Order Lunch for Team Rehearsal	Mary Ann B.	8/15	
Presentation Rehearsal Coordination	Sheryl M.	8/15 & 8/16	

# Joint Ventures



**Haselden-Barton Malow**

**Haselden Barton Malow**

**Haselden/Barton Malow**

**HBM**

# Joint Ventures

## 2.1 Criteria One Pre-Construction Phase Services



36

Years of Industry Experience

### Education/Certifications

Master Electrician License 1985

Journeyman Electrician License

Certified Professional Estimator (CPE),  
American Society of Professional  
Estimators

Coursework, Central Michigan University

Member, Business Management  
Applications and Accounting,  
BOMA of Michigan

Construction and Facilities Management  
Seminar, Chicago, Illinois

Estimating/Project Seminar,  
Clemson University, South Carolina

Safe2Work Certified

OSHA 30-Hour

### Jim Georges, CPE

#### MEP Specialist

#### Key Advantages

- ✓ 36 Years Experience
- ✓ Registered Professional Estimator
- ✓ Master Electrician
- ✓ Multi-phased Complex Projects
- ✓ Client-focused Preconstruction Development
- ✓ Innovative Solutions & Problem Solving Skills
- ✓ Barton Malow's Chief Electrical Estimator

#### Project Role

Jim would be responsible to work with the entire preconstruction team to ensure that all owner expectations are being met. He would provide constructability reviews and would start working with major subcontractors at the early stages of construction to provide advice on local practices to the MEP engineers. He will work closely with the Lead Estimator to ensure a well-qualified bid list and scope out complete integrated bid packages. Upon receipt of the bids Jim will analyze, verify scope and make recommendations to the lead estimator and project as to who is the lowest responsible bid. During the project he would follow the progress and ensure that everything is per plan specification.

#### Professional Profile

Jim has 36 years' experience in the construction industry. He has spent the majority of those years in the electrical contracting business working as an apprentice, journeyman electrician, field superintendent, general foreman, estimator/project manager, and vice president of operations. His electrical projects have included multi-family dwellings, commercial projects, educational facilities, industrial facilities, and health care facilities.

#### Project Experience

- \$83 Million Auraria Higher Education Center, Science Building Addition and Renovation, Denver, CO
- \$520 Million University of Michigan, C.S. Mott Children's & Women's Hospital, Ann Arbor, MI
- \$226 Million University of Michigan, Cardiovascular Center, Ann Arbor, MI
- \$212 Million Fletcher Allen Health Care Renaissance Project, Burlington, VT
- \$228 Million University of Michigan, Palmer Drive Development, Ann Arbor, MI
- \$54 Million University of Colorado Educational Facility 2, Aurora, CO
- \$226 Million University of Michigan Football Stadium Expansion, Ann Arbor, MI
- \$192 Million Boston University, Agganis Arena & Rec Center, Boston, MA



2.1.29

## 2.1 Criteria One Pre-Construction Phase Services



26

Years of Industry Experience

### Education/Certifications

Bachelor of Science,  
Building Construction and Contracting  
Technology, Purdue University

Associate of Applied Science,  
Architectural Technology,  
Purdue University

OSHA 10-Hour Safety Training

ASHE Healthcare  
Constructor Certification

OSHA 30-Hour

### David Martin

#### Project Manager

#### Key Advantages

- ✓ Multi-Project Leadership
- ✓ ASHE Certified Healthcare Constructor
- ✓ Team-Oriented Leadership
- ✓ 26 Years of Large-Scale Healthcare Construction Experience
- ✓ Experience Working with Teamed Partners

#### Project Role

Dave will provide overall administrative and technical direction for the project. He fosters a sense of community and establishes team relationships, administers progress throughout program duration and manages costs and schedules while overseeing the total construction effort. He ensures budget, schedule and safety policy adherence and ensures all company policies and standards are followed. He provides direction on planning, engineering and accounting functions and continually reviews all areas of work to ensure the most cost effective method of operations.

#### Professional Profile

With 26 years of experience in the construction industry, 21 of those years with Barton Malow, Dave brings seasoned project leadership to the ConocoPhillips team. His project experience includes a wide spectrum of owners, facility types and project sizes completed in various locales across the country. An outstanding communicator with a hands on management style, Dave can delve into the details when needed and still stay focused on the big picture. His team oriented leadership style coupled with his experience of delivering many projects with teamed partners will enhance the site operations team performance. Dave has a history of successful projects, many of which are repeat clients because he is a forward thinker who meticulously plans the work and heads off issues before they occur. When issues arise, Dave and his team will work toward win - win solutions for all project stakeholders.

#### Relevant Experience

- \$241 Million St. John Health System, Providence Park Hospital Expansion Program, Novi, MI
- \$80 Million Oakwood Healthcare System, North Addition, Dearborn, MI
- \$50 Million BJC Health Care, Progress West Healthcare Center, O'Fallon, Missouri
- \$30 Million Providence Hospital and Medical Center, Master Plan Phase I: ER & Surgery, Southfield, MI
- \$21 Million Mercy Hospital Corporation, Expansion & Renovations - Dubuque, IA
- \$15 Million Detroit Medical Center, Detroit Receiving Hospital Trauma & ER Renovation - Detroit, MI



2.1.18



# Key Takeaways

- ✓ **Build Your Team Early!**
- ✓ **Bring Marketing to the Table Early!**
- ✓ **Utilize Tools for Seamless Delivery!**



# Questions?



# Join the AGC Business Development Forum

[www.agc.org/businessdevelopment](http://www.agc.org/businessdevelopment)

Sarah Gallegos – gallegoss@agc.org