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.
Pre-Proposal

Teri Jones
Vice President of Business Development
Sundt Construction
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!
Proposal

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

Quality People. Quality Projects.
• 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 +/-2
PRECONSTRUCTION

We believe that the success of any construction project begins in the preconstruction phase. The results of preconstruction planning, engineering, and construction design are critical to successful project completion. Our team has extensive experience in preconstruction planning, engineering, and construction design. We understand the importance of having a well-planned project to ensure its success.

Collaboration

The success of any construction project is dependent on strong collaboration between all parties involved. We believe that our team can provide a seamless delivery of services to ensure project success.

Subcontractor Involvement

Using our network of subcontractors and material suppliers, we are able to develop a comprehensive and accurate estimate. We work closely with our subcontractors to ensure they meet our high standards for quality and safety. We are committed to providing our clients with the best possible service.

Estimating

We emphasize a "Design-to-Budget" philosophy. In this approach, we work closely with the design team to deliver a design that is both functional and cost-effective.

SITE SUPERVISION

The site supervision of your project will be handled by our superintendent. Our superintendent will be assisted by our project manager and project 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 give 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-time completion of the project.

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

preconstruction

We believe that the success of any construction project begins in the preconstruction phase. This phase is the framework in which the information, insight, processes, and high-quality construction required for success are established. Our process requires the 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 the project schedule plan
- Establishing site-specific safety plan
- Developing public communications plan
- Environmental management plan

site supervision

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

- Your best interests are at the forefront:
  - Daily reassessment of site project site
  - Daily safety supervision
  - Daily tracking of schedules
  - Coordinating with work crew
  - Overseeing quality and performance
  - Obstacle guidance to trade contractors
  - Prompt and timely communication
  - Leadership for daily weekly and monthly meetings
  - Team and site leadership, maintaining site and team public relations

New Headquarters Building - Broomfield, Colorado
Qualifications for General Contracting Services - 12 -
Doug Ortiz, Project Manager

Roles and Responsibilities

As Project Manager, Doug provides leadership and directs project management activities. Doug 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 ABP'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 area to ensure success. Doug's chief duties are to provide leadership and an additional level of commitment to each project, ensuring 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
- 1626 Broadway Downtown Denver Occupied Renovations
- Kennedy Harriman Downtown Franklin Medical Campus Occupied Renovations
- Adams 12 The Suds School Renovations
- Douglas County Schools Creense Creek Elementary Renovations
- Boulder Valley Emerald Elementary Renovations
- Adams 12 2007 Summer Renovations
- Adams 12 2008 Summer Renovations
- Adams 12 Northglenn High School Renovations
- Bearskinridge Recreation Center Renovations
- Bearskinridge Recreation Center Pool Replacement
- Denver Public Schools Viera 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 Awards - Graduate
- LEED Accredited Professional
- OSHA 10/30/30 hour training

Experience

34 years in construction project management, mechanical, electrical coordination and estimating, and almost 17 years with ABP.

References

- Todd Pimble, Sr. VPIE, Valley School District, 303-122-4407
- Jonatha Mankeller, Adams 14 District, 303-122-4407
- Nicki Horns, President, KLH Engineering, 303-122-4407
6.1 Project Staffing

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 site visits, from design through construction completion.
- Understand and control the financial goals for your project contract, and budgets.
- Ensure that your best interests are always first and foremost.

Education, Certifications and Memberships
- LEED Accredited Professional
- Construction Manager - University of Colorado
- OSHA 30 Hour Certification
- Carpenter program graduate, Association of General Contractors School of Carpentry
- First Aid/CPR Certified, Association of General Contractors
- Leadership Aurora Graduate

Experience
31 years of construction experience and 17 years with AGP

References
Tom Assistant, Sunco, 303-123-4567
Chad Steele, J.F. Brennan, 303-123-4567
Brian Larsen, K-12 Vista Valley School District, 303-123-4567

Most Relevant Projects

Sunco USA Headquarters
- LEED Silver
- Similar scope: 15,000 sf office building
- ENR Top 500 Firm Project 2013
- Completed with the use of our proposed project team

St. Vrain Red Hawk Elementary
- LEED Gold
- Similar scope: 21,000 sf building
- Location in Boulder County
- ENR Top 500 Firm Project 2013

Adams City Learning Center
- LEED Silver
- Located in Denver, CO
- Collaborative environment
- Gold Level LEED for Schools

APS Viera Peak Campus
- LEED Silver
- 88,100 sf
- Fully coordinated BIM utilized

Cib Moss
- LEED Gold certified
- 68,300 sf
- Fully coordinated BIM utilized
6.1 Project Staffing

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 this teamwork is reliable information, sound decisions, 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 team goals.

LISTEN AND UNDERSTAND
The first step in accomplishing this is to understand the process you have already initiated. We know that there is extensive, expensive work already underway, and where we can more thoroughly understand the reasons for and limitations there will be guidance for our project moving forward.

The result of this teamwork is reliable information, sound decisions, and high-quality construction. As A&K, we have a unique perspective on how each member of the core team, which allows for high standards to be set toward the same team goals. A&K is able to provide information and feedback in a timely manner, facilitating communication and maintaining team trust throughout the project.

FACILITATE
This is just the beginning. As construction managers, we are masters at understanding schedules while allowing for ideas and suggestions. We believe that our role is to facilitate communication, to express our experience, and build another accountable project.

We have many processes and tools to accomplish this—techniques such as developing a team charter, and utilizing powerful planning workshops.

A&K embraces a “Design-to-Budget” philosophy. In this approach, we work closely with the design team to deliver an initial design to a firm budget. We then ensure that the design team understands the cost implications of each iteration of design, and thoroughly document “design to budget” with accurate cost estimates.

In addition to this, we also prepare formal cost estimates that we will present as the project team and key stakeholders as traditional design iterations.

To ensure the accuracy of our estimates, we utilize North (3D) and Eleventh (720) to assist in accurately quantifying and detailing cost for our projects. The benefits of using these applications are provided at the project and decision-making stages. Our systems allow us to complete our tasks more efficiently and focus our time and energy on the critical elements of the project. These systems also allow us to share project documents and information between team members for the improved purpose of maximizing immediate resolutions to project challenges. This allows greater access and encourages involvement by all team members without delaying the process.

EXECUTE
We move through our processes. Once the project has been set up, teams are assigned to specific tasks. One construction team will execute the construction schedule and overall project. We do what we say we are going to do. To establish trust and demonstrate our commitment, we actively communicate with our clients and will do our best to satisfy all the requirements of the job.
6.1 Project Staffing

Diagraphe how this project team intersects with the design team and owner.

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

LISTEN AND UNDERSTAND
The first item to accomplish is to integrate into your team and understand the process that you have already undertaken. We want to have an accurate perspective within the team, and when we can move thoroughly understand the process at the vision that has been made on this point, we can apply this means to future decisions the team makes.

FACILITATE
This is where 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.

EXECUTE
We follow through on our promises. Once the project has been set up for success in preconstruction/design, our construction team moves 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 30-100 year building.
Examples

b. Team Information

b) Provide a description of your firm’s experience with Building Information Modeling.

Select experience utilizing virtual design and construction:

- Northern High School
- Falcon Promenade, Eastside Medical Campus
- Western High School
- Garden City High School
- Frost Park Medical Center Phase I
- MM 104
- Miami City High School
- Belle Mountain High School
- Missoula High School
- The Annex at Harvard
- University of Wyoming College of Business
- New Beginning Housing Affordable Housing
- Animal Task Market Center Yetakko
- MISO PD Program Corridor Improvement
- Living Park Apartments, Bagdad Family
- Mountainside High School
- SPC Vista Park High School
- Montana Park
- International BIS and BMS
- University of Memphis
- Shiloh For Detention
- Calhoun School, Phase II Renovation
- Mountain Home City College
- Clear College Center
- Lotsa 28th Operations Center
- Raleigh District Hospital
- Towson University (2006)
- University of Minnesota
- Center Point
- American Airlines
- Eastland Park Medical Center
- CTC Alpine Center
- Cross Range Community College Campus
- Methodist College Center
- Bridgehead Independent
- University of Montana
- Garden City School of 2015, 2016
- AGC, Baltimore Hall

Total Cost: $10,000,000

- $10,000,000
- $8,000,000
- $7,000,000
- $6,000,000
- $5,000,000
- $4,000,000
- $3,000,000
- $2,000,000
- $1,000,000

AGC of America
THE ASSOCIATED GENERAL CONTRACTORS OF AMERICA
Quality People. Quality Projects.
• 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
Joint Ventures

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

Quality People. Quality Projects.

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 success of our employees, company, and to move forward with purpose.

Trust
- To continually earn the trust of others, based on our integrity.

Integrity
- To always do what is right, maintain our reputation and our company’s integrity.

To always do what is right

Service
- 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.

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

Trust

- Earned from coworkers for granted

Working with a positive & Progressive attitude

Finding solutions, not problems

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, understanding, and empowering

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

AGC of America
THE ASSOCIATED GENERAL CONTRACTORS OF AMERICA
Quality People. Quality Projects.
Joint Ventures

I love Helvetica.

I hate Helvetica.

Adobe InDesign

Google Drive
# Joint Ventures

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

2.1 Criteria One

Pre-Construction Phase Services

Jim Georges, CPE
MEP Specialist

Key Advantages
- 36 Years Experience
- Registered Professional Estimator
- Master Electrician
- Multi-Phase 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 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 bid, Jim will analyze, review, 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 hospital admissions, commercial projects, educational facilities, industrial facilities, and health care facilities.

Project Experience
- 581 Million Austin Higher Education Center Science Building Addition and Renovation, Denver, CO
- 552 Million University of Michigan C.S. Mott Children’s & Women’s Hospital, Ann Arbor, MI
- 522 Million University of Michigan Cardiovascular Center, Ann Arbor, MI
- 512 Million Texas A&M Health Science Center, Galveston, TX
- 532 Million University of Michigan, Palmer Brawne Development, Ann Arbor, MI
- 541 Million University of Colorado Denver Health Care Facility, Aurora, CO
- 504 Million University of Michigan at Ann Arbor Student Events, Ann Arbor, MI
- 592 Million Boston University Agassiz Annex & Rec Center, Boston, MA

2.1 Criteria One

Pre-Construction Phase Services

David Martin
Project Manager

Key Advantages
- Multi-Project Leadership
- ASHE Certified Healthcare Contractor
- 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 project, 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 Caroliphilips 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 dive 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 work toward win-win solutions for all project stakeholders.

Relevant Experience
- 223 Million St. John’s Hospital Expansion, Providence Hospital Expansion Program, New, MI
- 501 Million Advanced Healthcare Systems, North Additions, drawer, MI
- 534 Million JFK Medical Center, Project Healthcare Center Phase 1, Detroit, MI
- 519 Million Providence Hospital and Medical Center, Block 302 Phase I, E.R. & Surgery, Southfield, MI
- 527 Million Samaritan Hospital (Columbia), JBCM-12120, Dubuque, IA
- 515 Million Dearborn Medical Center, Bettis Kennedys Hospital Trauma & ER Expansion - Dearborn, MI
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

Sarah Gallegos – gallegoss@agc.org