

Cascadia Chapter Meeting  
MINUTES  
March 11, 2009 / 5:30 – 8:00 PM /  
Duke's Chowder House / Southcenter, WA

Attendees:

Andrea L. Ball (O-Sec)	Craig Lenning
Hank Ball	Blane Long (O-VP)
Randy Barber (B)	Don Owings
Anna Bremmer	Michael Schneider
Bill Hickey	Ken Smith (B)
John Langer (O-T)	Marlo Stebner

*[O = Officer; B = Board Member]*

- I. Welcome and Introductions (BL)
  - a. Per the membership's request, this is our first meeting in the Southcenter area of the I-5 corridor. If this works out we'll schedule more meetings at this location.
  
- II. Committee Reports
  - a. Membership/Communication (ALB)
    - i. Membership: Scott Sawyer with WHPacific in Olympia is our newest member. This brings the Cascadia membership to 75.
  - b. Treasurer (JL)
    - i. Balance as of February 23, 2009                      \$3,660.00
  - c. Government Affairs (BL)
    - i. A letter to the WA Legislature has been drafted and ready to go.
  - d. Programming (BL)
    - i. April meeting will be Dan Clancy discussing his presentation at the CEFPI conference in Canada regarding Value Scoping sessions with Alberta Infrastructure. The meeting will be in Tacoma.
    - ii. May's program will be presented by Randy Barber on a topic to be determined. The meeting will be held in Seattle.
    - iii. April or May's meeting may be done as a webinar – watch email and the web site for more details.
    - iv. June's meeting will be held during the SAVE Conference in Detroit. Details coming soon.
    - v. As is our tradition, there will be no meetings in July/August. We will start up again in September.
  
- III. 2009 Project (JL)
  - a. Work continues on identifying a partnering opportunity to combine value methodology with a not-for-profit organization. Common Ground and the Seattle Housing Authority have been contacted.
  - b. Interested Cascadia members should contact John Langer:  
[jlanger@bluewaterpm.com](mailto:jlanger@bluewaterpm.com)
  
- IV. Matrix of VE Studies (JL)

- a. John has identified two recent value studies that can be added to the matrix to demonstrate the value of VE. Other projects are needed. Other firms with possible projects should contact John for more information: [jlanger@bluewaterpm.com](mailto:jlanger@bluewaterpm.com)
- V. Conference hosting update
- a. Andrea has been in touch with Renee Hoeckstra about the possibility of Cascadia hosting the 2011 or 2012 SAVE Conference.
    - i. Local chapter duties include lining up keynote speakers, making recommendations for location, events, activities and excursions, providing projectors and aiding with logistics during the event.
    - ii. The SAVE business office will handle hotel negotiations
  - b. Seattle and Portland are both viable options. There are concerns that the government rate may not be acceptable to hotels in the downtown area.
  - c. Renee is checking with the SAVE Board about 2011 – if Cascadia hosted that would place the conference on the West coast two years in a row. This may be acceptable due to Cascadia’s willingness to host. 2012 is the alternate date.
  - d. The Crown Plaza was used for the Seattle AASHTO conference but is not a recommended space for SAVE.
  - e. If advertising needs to be done during the Detroit conference, there is concern that just one city – Seattle or Portland – should be emphasized.
  - f. The question was raised about how much flexibility there is in deciding the date of the conference. Could it be held in July or August when the weather is better in the Northwest?
- VI. Education
- a. Mike Adams’ Choosing by Advantages three day course is tentatively scheduled for late April but attendance numbers are a concern. We need 10-12 attendees to keep the cost around \$1,000 per attendee. State workers have been told they will not get approval for education or travel for the foreseeable future. Suggestion is to hold off on this course until the Fall.
  - b. Cascadia’s own Ken Smith and Laurie Dennis will present a session on Value Engineering & Risk Cost Assessment and the CMAA PNW Chapter Winter Conference. See the web site for more details.
- VII. Presentation: Ken Smith and Don Owings: “Ever wonder how your Statement of Qualifications (SOQ) or Request for Proposal (RFP) is scored by a State agency?”
- a. Ken, formerly with WSDOT, and Don, currently with WSDOT, gave an engaging and informative presentation. They started with a group-developed FAST model of the consultant selection process from the agency’s perspective. This was followed by a presentation on helpful hints for submitting proposals and being interviewed.
  - b. Please see additional notes and the FAST model below.
- VIII. Adjourn

ADDENDUM: Notes from the presentation

Ken Smith and Don Owings (HDR) helped us build a FAST model on the selection of consultants from a state agency perspective. Ken then give us some info about what to do and not do in both the written proposal and the interview. Here are a couple of the highlights:

- Answer the questions and provide the info requested
- Don’t provide unsolicited info – it won’t be scored/evaluated anyway

- If they ask for 20 pages and you provide 21 they will not score the 21<sup>st</sup> page – you best hope there's no required info on that page or you'll get 0 points on that section
- Dress just slightly better than the interview team. Do not make the mistake of wearing a suit to an interview in Forks.
- Don't be so well rehearsed for the interview that you fall apart if an unexpected question arises
- Have contingency plans – paper and electronic presentations, multiple folks who can answer any given question, etc.
- Be sure your interview team knows who's going to speak to what – you don't want to talk over each other
- Don't bad-mouth the competition or call and pester the interview teams with questions about their likes/dislikes/hobbies
- Be sincere
- Understand that the questions asked may have nothing to do with what they're trying to evaluate. (Ex: Interviewees were told some of the info in their proposals was inaccurate and were asked to respond. What they really want to know is how you handle adversity.)
- Have people who will be involved in the project on the interview team, not a bunch of executives

Perhaps the most important thing said was that the job of the evaluation team is not to select the winner but to eliminate all but one candidate. If you get past the initial responsiveness cut off you're essentially as qualified as everyone else and the evaluation team will be looking for any reason it can find to eliminate you from the competition. Thinking about the process that way sheds a whole new light on things.

*See FAST Diagram on next page.*

# FAST Diagram

## SAVE Cascadia Chapter Meeting – Selecting a Consultant

