THE SECRET TO THE SUBCONSULTANT SELECTION PROCESS

SUSAN MERRIGAN, FSMPS, CPSM
SKIDMORE, OWINGS & MERRILL
AGENDA

1. The Prime Perspective
2. Business Development
3. Consultant Selection Process
4. Data Call Process
5. Integration of Consultant Data
6. Proposal Samples
7. Tips to Improve Your Materials and Website
THE PRIME PERSPECTIVE
MARKETING PROCESS

- OPPORTUNITIES
- MARKETING PLAN
- SALES
- PRESELLING
- PROPOSALS
WHY TEAMS WIN

- INTERVIEW
- FEE
- PROPOSAL
- RELATIONSHIP
PRESELLING

Consultant Influence

No-Go

WIN PROBABILITY (%)

CREATIVE

PROACTIVE

REACTIVE

24 12 6 0 MONTHS

Solicitation Selection

WIN PROBABILITY (%)

0 20 40 60 80 100

24 12 6 0 MONTHS

Solicitation Selection

WIN PROBABILITY (%)

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24 12 6 0 MONTHS

Solicitation Selection

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Solicitation Selection
FINDING THE SWEET SPOT

Clients Wants/Needs

Strengths

Competitor Weaknesses
KNOW YOUR CLIENT

Client Explanation of Need

How RFP Described Need

Firm Guesses at Client's Need

How Price was Established

How Proposal was Prepared

What Client Actually Needed
GO/NO-GO PROCESS

Fee Potential
Win Probability
Can you Deliver it
Quality of Relationship
Portfolio and Personnel
Available Resources
Repercussions of NOT Submitting
CAPTURE PLANNING

Getting Started
- Capture Plan Development
- Client Analysis
- Message Development
- Presentation/SOQ/Proposal Storyboarding

Maintaining Momentum
- Make Team Assignments
- Establish Deliverable Schedule
- Gather Information Needed for Submittal
- Coordinator Leads Production of Draft Submittal

Finishing Strong
- Team Review of Draft Document and Revision
- Blue Team Draft Orientation
- Red Team Review of Draft Document
- Blue Team Recovery
- Green Team Review of Fee Documentation
- Final Submittal Production

Lasting Impressions
- Team Continues Fine-tuning Presentation
- Presentation Practice
- Q&A Practice (Including Who Answers Specific?)
- Develop Any Leave-Behinds (Brochures, Handouts)
- Selection Committee Analysis

Everything you need to know to win
PROPOSAL PROCESS

DAY 1
RFP COMES IN
Schedule Kick-off Meeting to occur within 2 business days. Confirm Attendees

DAY 2

DAY 3
Kick-off Meeting

DAY 4
Research /Outline

DAY 5
Content Due:
Approach / Consultant Marketing Materials

DAY 6
Draft approach

DAY 7
Draft schedule / fee

DAY 8
Marketing Review
1st Page Turn
Fee Review
2nd Page Turn
Marketing Review

DAY 9
Finalize Fee / Schedule
Fee Due
Edits / Comments Due

DAY 10
Print / Send
Edits / Comments Due
Print / Delivery
WHAT WORKS

Relationship Building:
- Indispensable resource
- Meet and Greets / Lunches
- Principals, PMs, business development and marketing
- Outreach at networking events
- Activity on Association Boards
- Quick touchbase calls
- Mentor-protégé relationships
- BE LIKABLE!

Specific Project:
- Strategic partnering
- Early outreach
- Succinct opportunity emails
WHAT DOESN’T WORK

Internal disorganization
Duplicative outreach
Overly aggressive
Vague spam emails
Late outreach
Negative previous experience
Unlikable business developers
WHERE WE LOOK

Long-term consultant relationships
Consultant profiles
Database/spreadsheets
Principals, project managers, and marketing/BD
Clients and contracting officers
Referrals from other consultants
Google consultant websites
PROPOSAL CRITERIA

Small Business Requirements
Experience with Prime, Client and/or Project Type
Matrix to Prime’s Selected Projects
Required Labor Categories
PRIME’S EVALUATION CRITERIA

Firm Compatibility
Complementary Services/Experience
Market Position/Reputation
Common Core Values
Reciprocal Relationship
Flexibility
Successful Prior Teaming Experiences
View of Past and Current Clients
Financial Stability
Size, Resources, and Technical Capability
QUALITY OF RESPONSE

Responses should be:
- Customized
- Complete
- Timely
- Knowledgeable

Key Influencers:
- Accessibility and responsiveness
- Previous teaming experience
AA. Provide services for the construction phase, as required by the A/E Manual, for the administration of the contract.

VI. PARTICIPATION OF SWAM BUSINESSES AND MICRO BUSINESSES:

Under Executive Order 20 (2014), Cabinet Secretaries and all executive branch agencies are directed to continue and advance the following on a race and gender neutral basis: exceed a target goal of 42% on discretionary spending with small businesses certified by DSBSD (the Virginia Department of Small Business and Supplier Diversity).

Owner’s SWAM Business Participation Goal: 42% - with targets for 25% Small Business, 8% women owned business and 9% minority owned business.
## SBE Participation Goal

<table>
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<tr>
<th>Discipline</th>
<th>Proposed Team Member</th>
<th>SWaM Type</th>
<th>Building</th>
<th>Campus Utilities</th>
<th>Aggregate</th>
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<td></td>
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<td>Estimated Fee: $3,000,000</td>
<td>Estimated Fee: $11,200,000</td>
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<td>NA</td>
<td>NA</td>
<td>52% $4,264,000</td>
<td>5% $150,000</td>
<td>39.41% $4,414,000</td>
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<tr>
<td>Civil</td>
<td>S</td>
<td>S</td>
<td>5% $410,000</td>
<td>38% $1,140,000</td>
<td>13.84% $1,550,000</td>
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<tr>
<td>Landscape</td>
<td>NA</td>
<td>NA</td>
<td>4% $328,000</td>
<td>15% $450,000</td>
<td>6.95% $778,000</td>
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<tr>
<td>Structural</td>
<td>W</td>
<td>W</td>
<td>8% $656,000</td>
<td>0% $0</td>
<td>5.86% $656,000</td>
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<tr>
<td>Mech / Elec</td>
<td>NA</td>
<td>NA</td>
<td>18% $1,476,000</td>
<td>0% $0</td>
<td>13.18% $1,476,000</td>
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<tr>
<td>Plumbing/FP</td>
<td>M</td>
<td>M</td>
<td>7% $574,000</td>
<td>0% $0</td>
<td>5.13% $574,000</td>
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<tr>
<td>Campus Utilities</td>
<td>M</td>
<td>M</td>
<td>0% $0</td>
<td>40% $1,200,000</td>
<td>10.71% $1,200,000</td>
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<tr>
<td>AV/IT</td>
<td>S</td>
<td>S</td>
<td>3% $246,000</td>
<td>0% $0</td>
<td>2.20% $246,000</td>
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<tr>
<td>Cost</td>
<td>M</td>
<td>M</td>
<td>2% $164,000</td>
<td>2% $60,000</td>
<td>2.00% $224,000</td>
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<tr>
<td>Code</td>
<td>NA</td>
<td>NA</td>
<td>1% $82,000</td>
<td>0% $0</td>
<td>0.73% $82,000</td>
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<table>
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<th>SwaM Participation:</th>
<th>Rounded</th>
<th>Target</th>
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<tr>
<td>Small</td>
<td>16.04%</td>
<td>16%</td>
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<tr>
<td>Women</td>
<td>5.86%</td>
<td>6%</td>
</tr>
<tr>
<td>Minority</td>
<td>17.84%</td>
<td>18%</td>
</tr>
<tr>
<td>TOTAL</td>
<td>39.73%</td>
<td>40.00%</td>
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</table>
DATA CALL
RESPONDING TO A DATA CALL

Follow the directions
Your data will not be inserted “as-is”
Use the templates
Make it easy to reformat
Customize for THIS project
Title your personnel appropriately
SAMPLE DATA CALL

Subject: DATA CALL: GSA National AEI IDIQ
Importance: High

Team,

In the essence of time, I am sending a group email following up on our phone calls/emails about this pursuit. We have been shortlisted and need to submit the Phase II proposal by Wednesday (10/21) so we need to move fast. Please **provide the following by Monday morning at 10am**. I am happy to receive items piecemeal and will be working over the weekend!

Please provide the following:
1. One resume per discipline (use attached template)
2. Questionnaire (attached)
3. Logo
4. SF330 Part II for relevant offices
5. Salary Table (attached)

I would appreciate **confirmation you have received this request AND can deliver by this deadline.**
FIRM PROFILE

Questionnaire for GSA A/E/I IDIQ

Name of Firm: Global Engineering Solutions
Discipline(s) engaged for this pursuit: Mechanical, Electrical, Fire Protection and Plumbing Engineering Services
Year Established: 2002
Number of Employees: 71
Location of All Offices (City, State): 6700A Rockledge Drive, Suite 300, Bethesda, MD 20817
DIF Status (if applicable — please specify): US Small Business Administration (SBA) — 508, WOSB, EDWOSB

List any experience with GSA:
- GES has experience working with the U.S. General Services Administrations:
  - The Department of State Relocation to American Red Cross Building, Washington, DC, completed with Perkins+Will
  - Forrestal Building, Washington, DC
  - Mothballing/Stabilization Study for Facilities at Walter Reed Army Medical Center, U.S. General Services Administration, NCR

List any experience with IDIQs:
- Extensive experience with 11 IDIQ contracts

Firm Profile:
Please provide a solid paragraph (for us to include in the SF130 Section H) that includes the expertise your firm brings to this IDIQ contract. See the sample for guidance on content.

Global Engineering Solutions (GES) is a certified Woman-Owned Small Business (WOSB), Small Disadvantaged Business (SDB), and Economically Disadvantaged Woman-Owned Small Business (EDWOSB), engineering, program management and construction management firm specializing in mechanical, electrical, plumbing and fire protection engineering (MEP & FP). As one of the premier engineering firms in the area, GES is recognized as a leader in the design of facilities for government, education, health care and commercial clients.

With offices in Bethesda, Maryland, Washington, DC and New York, NY we are able to provide the expertise to satisfy a wide range of our clients’ needs. We are staffed by a team of highly qualified professionals who are known for their commitment to excellence and their ability to complete projects on time and within budget. Their innovation and focus on quality has been responsible for the growth of our firm, and has earned GES recognition from HVAC Magazine, Consulting-Specifying Engineer and the Washington Business Journal.

Our experience covers a wide range of services, projects and delivery methods. We have provided feasibility studies, building assessments, master plans, design reviews, energy audits, value engineering, code analysis, MEP & FP system designs, construction administration, program management and construction management services on new construction, renovation, and historic preservation projects.

Washington, DC

Robert Silman Associates (RSA) specializes in providing high quality structural engineering services for large, technically complex projects. The firm has served as structural engineering consultant on more than 18,000 projects. New construction accounts for 50% of their entire workload.

RSA has developed a special expertise in the engineering of historic buildings. In fact, RSA has consulted on more than 400 registered landmark buildings. Their proficiency in the use of preservation techniques has aided their efforts in saving America’s architectural heritage. Special areas of expertise are in the assessment and monitoring of structures, façade investigation and repair, investigation of building failures and response to emergency structural situations.

With offices in New York City, Washington, DC, and Boston, the firm presently numbers 130, of whom more than 50 have professional registration and over 20 are LEED Accredited Professionals. RSA has a long history of working with both the Commonwealth of Virginia, DGS, and Perkins+Will including the recently completed George Mason University Exploratory Hall and Commonwealth Center for Advanced Manufacturing. Other representative projects include: Virginia State Capitol, Richmond Main Street Station and Trainshed, Patrick Henry Building, Virginia Commonwealth University, and U.S. Supreme Court Building.
Title your staff per the RFP
Reformat per template
Know the SF330
# Projects

## Relevant project list

## Thumbnail project photos

<table>
<thead>
<tr>
<th>Firm's Representative Projects</th>
<th>Bank of America Corporate Center</th>
<th>Shanghai Natural History Museum</th>
<th>GSA Design, College US Coast Guard HQ at St. Elizabeth Campus</th>
<th>Exxon Peabody Law Offices</th>
<th>Prime Minister's Office</th>
<th>National Institutes of Health, Porter Neuroscience Research Center, Phase II</th>
<th>FOX Term Contract and Virginia Square Headquarters Campus</th>
<th>GSA, Federal Energy Regulatory Commission</th>
<th>GSA, NIOSH and National Engagement Contracts for Workplace Strategy</th>
<th>New York City Police Academy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Size: 1,179,000 SF</td>
<td>Size: 1,179,000 SF</td>
<td>Size: 1,2 Million SF (Phase 1A), 150,000 SF (Phase 1B)</td>
<td>Size: 70,000 SF</td>
<td>Size: 820,000 SF</td>
<td>Size: 522,000 SF</td>
<td>Size: Varies by Task</td>
<td>Size: 450,000 SF</td>
<td>Size: Varies by Task</td>
<td>Size: 720,000 SF</td>
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<tr>
<td>Completion Date: 2010</td>
<td>Completion Date: 2016</td>
<td>Completion Date: 2013 (Phase 1A), 2015-2016 (Phase 1B)</td>
<td>Completion Date: 2014</td>
<td>Completion Date: 2015</td>
<td>Completion Date: 2018</td>
<td>Completion Date: 2014</td>
<td>Completion Date: 2013-2017</td>
<td>Completion Date: 2014</td>
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</table>

### Key Attributes

- **Workplace Strategy**
- **Sustainable Design**
- **Integrated Teams**
- **Historic Preservation**
- **Complex Design Issues**
- **Innovative Design Approach**
- **Innovative Building Design Solutions**
- **Technical Solutions:**
  - ADA Improvements
  - Security Design
  - Energy Solutions
INTEGRATION OF CONSULTANT DATA
<table>
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<tr>
<th>E. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT</th>
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<tbody>
<tr>
<td>Name: Will Pearl, PLA</td>
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<tr>
<td>Title: Security Specialist</td>
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<tr>
<td>Firm Name: Gordon Chantilly, VA</td>
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</tr>
<tr>
<td>Education: M.A., Landscape Architecture, Virginia Polytechnic Institute and State University; B.S., Landscape Architecture, University of Maryland; B.S., Agricultural Business, Northeast Louisiana University</td>
<td></td>
</tr>
<tr>
<td>Certification: Professional Landscape Architect (1180); Certified Protection Professional</td>
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<tr>
<td>Experience: 32 years with current firm</td>
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</table>

**Most relevant projects first**

1. **St. Elizabeths Security Fence and Gatehouse Update - Washington, DC**
   - **Year Completed:** 2012
   - **Role:** Security Specialist
   - **Details:** As a Security Consultant, Mr. Pearl was responsible for performing a CPTED assessment and working with the design team on the perimeter security and access control point design. Gordon performed on-going plan updates specifically for Phase 1 - the Security Fence and Gatehouse (SF) portion of the project. The services included necessary revisions to the previously completed construction drawings, and the revisions were documented in accordance with the submittal reviews. The project was completed within the requested time frame and included various coordination items.
   - **Size:** N/A, **Cost:** $500K (Security), **Role:** Security Specialist
   - **Dates:** 2012 – 2013

2. **U.S. Coast Guard Headquarters - Washington, DC**
   - **Year Completed:** 2013
   - **Role:** Security Specialist
   - **Details:** As a Security Specialist, Mr. Pearl provided site security consulting for the construction of a new USCG Headquarters facility and separate 1,000-car parking structure. The headquarters facility met the requirements for Silver LEED certification. Site planning took advantage of the spectacular views overlooking the Anacostia River and the DC skyline.
   - **Size:** 1.1M SF, **Cost:** $550K, **Role:** Security Specialist
   - **Dates:** 2013

3. **Customs and Border Protection Site Security Consulting - Jefferson County, WV**
   - **Year Completed:** 2011
   - **Role:** Security Specialist
   - **Details:** As a Security Specialist, Mr. Pearl provided security consulting services for a Welcome Center/Security Command Center (WC/SCC), and an access control point for the Advanced Training Center of the CBP.
   - **Size:** 153 Acres, **Cost:** $265K, **Role:** Security Specialist
   - **Dates:** 2011

4. **State Corporation Commission - Richmond, VA**
   - **Year Completed:** 2010
   - **Role:** Security Specialist
   - **Details:** Gordon conducted an extensive review of the risks and vulnerabilities that the SCC faces including traditional risk factors, as well as asymmetric threats. This analysis included a review of security systems, security programs, access control, CPTED opportunities and overall security programming.
   - **Size:** 11-Stories, **Cost:** $35K, **Role:** Security Specialist
Projects with client/prime firms involved in the project

In 2011, the Malaysia Prime Minister’s Office began an ambitious renovation of their main offices. Beyond improved efficiencies and reduced operational costs, the government wanted to develop an example project that would showcase the adoption and impact of green building standards. The design team worked closely with Prime Minister’s Office to develop multiple high-performance strategies for the 65,000 square meter campus, and in 2014 the project was awarded the first Platinum certification in the country.

The team began the work a constructability charrette, which developed several energy strategies that allowed the building to be operational during construction:
- building envelop upgrade for increased efficiency
- high efficiency chilled ceiling panel mechanical system
- high efficiency lighting
- interior planning to maximize daylight potential
- green roofs
- solar panels and building integrated photovoltaics (BIPV)
- water efficiency technologies
- wetland creation

Certified LEED Platinum in 2014, the renovation of the Prime Minister’s Office Complex served as a flagship project for the Country of Malaysia.

Many of these features reduced life-cycle and maintenance costs as well as energy demand. They also provided improved occupant comfort – with enhanced daylighting and regulated temperatures – and greater use of interior space and better office layout opportunities.
SMALL BUSINESS COMMITMENT

The Small, Women-owned, and Minority-owned Business (SWaM) certification program is a state program of the Commonwealth of Virginia. The purpose is to enhance procurement opportunities for SWaM businesses participating in state-funded projects. Perkins+Will/BCWH is committed not only to meeting specified Small Business goals for this project, but also provide meaningful participation. We have established relationships with numerous SBE/MBE/WBE firms across the nation and have found our collaborations to be mutually rewarding. Historically, Perkins+Will/BCWH has sought and utilized services of qualified local, small, disadvantaged, minority, woman and veteran-owned businesses. Approximately 30% of the total workload of Perkins+Will is performed for government and other public agencies with requirements for the maximum practicable contracting to these disadvantaged firms in accordance with the provisions of Public Law 95-507.

Our proposed project team exemplifies our firm’s commitment to securing opportunities for small businesses participating in a state-funded project such as the General Assembly Building and are strong proponents of the importance of building the Commonwealth of Virginia’s professional business community. In addition to being experts in the design of government and institutional buildings, a number of the firms comprising our team represent local Virginia-based firms with

<table>
<thead>
<tr>
<th>FIRM</th>
<th>ROLE IN PROJECT</th>
<th>SWaM</th>
<th>Virginia-based Incorporated Business</th>
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<tr>
<td>Perkins+Will</td>
<td>Architecture / Planning</td>
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<td>☐</td>
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<tr>
<td>BCWH</td>
<td>Space Planning / Programming / Interiors</td>
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<tr>
<td>Integral</td>
<td>Mechanical, Electrical, Plumbing</td>
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<tr>
<td>Wiss Janney Elstner</td>
<td>Historic Preservation</td>
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<td>Froehling &amp; Robertson</td>
<td>Geotechnical Engineering</td>
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<tr>
<td>S.B. Cox</td>
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WORKING TOGETHER
CONSULTANT TEAM

CONSULTANT TEAM

MECHANICAL / ELECTRICAL ENGINEERING: INTEGRAL GROUP
Integral Group is an interactive global network of design professionals collaborating under a single deep green engineering umbrella. They provide a full range of building system design and energy analysis services, with a staff widely regarded as innovative leaders in their fields. Located in eleven offices across North America, along with an international network of affiliates, Integral’s passion for sustainable design runs deep.

The firm's integrated approach to building systems design allows them to enhance opportunities that nature provides, working in harmony with a building’s environment to reduce its reliance on outside energy sources. Integral specializes in the design of simple, elegant, cost-effective systems for high performance building environments and provide comprehensive analyses that help prioritize their energy saving potential and carbon reduction effects.

Integral's design approach differs dramatically from traditional Mechanical, Electrical, and Plumbing engineering firms, they focus exclusively on highly energy efficient and sustainable design projects. An innovative leader in building MEP systems design, Integral Group designed the first zero carbon, zero energy commercial building in the United States, first laboratory with chilled beams, first laboratory to use radiant ceiling panel cooling, first net zero energy, zero carbon and LEED Platinum laboratory, first LEED Platinum rating for a laboratory in a historic building, first campus fuel cell installation, first LEED Gold microchip manufacturing plant, first pre-certified LEED Platinum data center, and first LEED Platinum office building in Canada.

Integral Group has significant expertise in higher education projects in addition to their recent work at GMU on Exploratory Hall. They provided services for a number of Colleges and Universities throughout the Commonwealth and are currently providing engineering services to University of Virginia for the renovation of the Chemistry and Glimer Hall buildings, the University of Mary Washington for the renovation and additions to the Jepson Science Center and for the new University Center at Longwood. Integral Group also has provided design services on a variety of projects for Virginia Tech, Virginia State University and William and Mary.

George Mason University Project Team: The Integral Group team is led by Principal in Charge, Tom Simpson, a managing principal and leader in Higher Education design. He brings extensive experience with local institutions including the above projects at George Mason University, University of Virginia, Virginia Tech and Longwood University. Their team has years of experience with designing, developing, and coordinating projects from the initial design phase through construction.

STRUCTURAL ENGINEERING: HOPE FURRER (WBE)
Hope Furrer Associates, Inc. is a full-service structural design and consulting firm established in 1992. The firm provides structural engineering services to architects, government agencies, developers, contractors, and other engineering concerns. Expertise includes University facilities, corporate office buildings, retail facilities, hotels, residential buildings, medical facilities, educational complexes, and parking facilities, as well as investigations and structural evaluations of commercial, institutional, educational, and telecommunication facilities.

The firm features an award winning portfolio comprised of more than 50 Higher Education projects for more than 20 Colleges and Universities totaling over $1 billion in construction costs. These projects include renovations, additions and new construction of athletic facilities, libraries, classroom buildings, laboratories, student centers, performance centers and dormitories.

While the majority of the firm's work includes substantial new construction, we are also experienced in projects that require renovation of existing facilities to allow for functional changes or upgrades to the existing facilities.

WFT’s qualifications include:
- More than 40 projects designed for LEED certification
- Familiarity with BCOM; three staff have attended COPM seminars within the last three years
- Various staff members have previous experience on projects involving BCOM
- Extensive experience with “design not to exceed” budgets
- Use of Revit MEP modeling to provide "live 3D" visuals of building components
- Experience with projects in conformance with the State's Construction and Capital Outlay procedures including Codes, Standards, Accessibility and Building Efficiency
- GMU project experience includes University Hall drawing reviews for three tenant floors, LAN room upgrades for an APC installation; and preparation of electrical specs for the Northeast Sector Development.
- A staff member has previous experience at GMU including electrical design for the Northwest Housing Villa A Complex, two new student housing buildings totaling 216,700 SF, completed in 2011.

WFT's relevant experience includes design of utility distribution systems, high temperature hot water (HTHW) and chilled water distribution systems, and campus infrastructure loop systems including the following projects:
- Towson University Burdick Hall Expansion - EP/PFP design for a $34M, 94,500 GSF expansion of the campus recreation facility, to be the new campus hub. Additional services
PROPOSAL SAMPLES
CLIENT: GENERAL SERVICES ADMINISTRATION
The Shanghai Natural History Museum, designed by Perkins+Will's Global Design Director Ralph Johnson, is a 44,517 square meter (479,180 square foot) museum offering visitors the opportunity to explore the natural world through the display of more than 10,000 artifacts from all seven continents. The building includes exhibit spaces, a 4D theater, an outdoor exhibit garden, and a 30-meter tall atrium that welcomes visitors with an abundance of natural light filtered through a striking glass wall inspired by the cellular structure of plants and animals.

The museum was inspired by the garden design of its homeland, integrating the spirit of nature and architecture. Adjacent to an urban sculpture park, the museum rises up as a spiraling landscaped plane surrounding an oval pond, its shape recalling the harmonious forms and proportions of a nautilus shell, one of the purest geometric forms found in nature. Through its relationship to the site, the drama of the exterior features, and its interior detailing, the museum represents the harmony of man and nature.

Within the spiraling plane is an oval courtyard containing a stepped garden composed of rock formations and water in the tradition of the “Mountain Water Garden.” The structural framing and sun shade lining the courtyard is an abstraction of patterns found in traditional Chinese garden pavilions, while also referencing the human cell. The north wall suggests the layering of tectonic plates, with the “living” east wall forming an arcade representing the vegetation of the earth’s surface. Together, these features focus our awareness on the fundamental elements of the natural world: plants, earth and water.

The Shanghai Natural History Museum is a bioclimatic building in that it responds to the sun by using an intelligent building skin that maximizes daylight and minimizes solar gain. The oval courtyard pond provides evaporative cooling, while the temperature of the building is regulated with a geothermal system that uses energy from the earth for heating and cooling. Rain water is collected from the vegetated roof and stored in the pond along with recycled grey water. All of the energy features of the museum are part of exhibits which explain the story of the museum.

The museum is in the Jing An District, in the center of downtown Shanghai, and within the Jing An Sculpture Park. The building replaces the original Natural History Museum and...
“The use of cultural references found in traditional Chinese gardens was key to the design,” said Ralph Johnson. “Through its integration with the site, the building represents the harmony of human and nature and is an abstraction of the basic elements of Chinese art and design.”

Improves the museum’s ability to exhibit its collection with 20 times more exhibition space.

The Cell Wall is the iconic feature of the Shanghai Natural History Museum, and is the main design feature from the initial competition phase. Composed of three layers, each with its own unique geometrical pattern and organic form, the wall is organized in an elliptical cone shape envelope. At the core is the main layer, the structural cell layer, which emphasizes the organic cells as structural building blocks of nature. An inner layer, the waterproof envelope of the building, is formed by the glass and aluminum mullion curtain-wall, and an outer layer provides a solar screen, emulating the cellular building block of all life forms.

In resolving complex organic geometries set to a full-scale building, there is a wealth of theoretical research on the subject of mesh structures, but very few built examples where these mesh geometries fully function as structural building elements and are built to architectural scale. To that extent, a historical approach to problem-solving was of little use in imagining and designing the cell wall, and instead innovative, original approach was sought out to achieve the elegantly complex and seemingly random organic patterns of the wall within the constraints of readily-available rectilinear building materials and structural realities.

<table>
<thead>
<tr>
<th>1. FIRM NAME</th>
<th>2. FIRM LOCATION (City and State)</th>
<th>3. ROLE</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Chicago, Illinois</td>
<td>Architecture, Interior Design</td>
</tr>
</tbody>
</table>
Perkins+Will worked on this GSA Design Excellence project for the DHS / U.S. Coast Guard since 2003 on Phases 1a and 1b, including the program of requirements and full bridging design for the new headquarters as well as a full range of consulting for workplace planning and strategies at the agency's previous multiple locations. The project is located on the 180-acre historic St. Elizabeth's Hospital campus in Southeast Washington, DC. Extensive regulatory design reviews were required by government agencies and organizations including the US Commission of Fine Arts and the National Capitol Planning Commission.

Phase 1a included a 1.2 million SF, 10-story building that houses 3,700 employees. It includes a multi-purpose room seating 400, the USCG Clinic, and executive suites with command center. Also included in this phase are two 7-story parking garages. Perkins+Will was also responsible for the IT, security and audiovisual technical integration design. Designed to LEED® Gold standards, the building has sustainable features that include 400,000 square feet of green roofs, high-efficiency mechanical systems, and newly constructed wet ponds, bio-swales, and rain gardens that assist with storm water management.

Phase 1b included developing the program of requirements and strategic planning and design for the adaptive reuse of six historic buildings on the campus. The historic buildings were fully restored and adaptively reused to provide shared amenity uses for the multiple federal agencies that plan to occupy the campus. This included the full abatement and structural restoration of a 236-seat dining hall, a 650-seat auditorium, a fitness center including a new basketball court, multiple conference rooms, and a retail exchange.

The overall square footage totals over 150,000 SF, most of which was severely damaged by the elements after 25 years of vacancy and neglect. The buildings were surveyed, documented, abated, structurally reengineered, and designed to have energy efficient shells, all new windows — many of which are blast-resistant and historic in appearance. The buildings are designed to LEED®

<table>
<thead>
<tr>
<th>Firm Name</th>
<th>Firm Location (City and State)</th>
<th>Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gordon</td>
<td>Chantilly, Virginia</td>
<td>Security</td>
</tr>
<tr>
<td>Shen, Misom &amp; Wike</td>
<td>Arlington, Virginia</td>
<td>Acoustics, AV / IT Infrastructure</td>
</tr>
<tr>
<td>Silman</td>
<td>Washington, DC</td>
<td>Structural</td>
</tr>
<tr>
<td>Weldinger</td>
<td>Washington, DC</td>
<td>Blast</td>
</tr>
<tr>
<td>Wiss, Janney, Elster Associates</td>
<td>Fairfax, Virginia</td>
<td>Historic Preservation</td>
</tr>
</tbody>
</table>
### 9. KEY PERSONNEL PARTICIPATION IN EXAMPLE PROJECTS

<table>
<thead>
<tr>
<th>28. NAMES OF KEY PERSONNEL</th>
<th>27. ROLE IN THIS CONTRACT</th>
<th>28. EXAMPLE PROJECTS LISTED IN SECTION F</th>
</tr>
</thead>
<tbody>
<tr>
<td>(From Section E, Block 12)</td>
<td>(From Section E, Block 13)</td>
<td>(Fill in &quot;Example Projects Key&quot; section below before completing table. Place &quot;X&quot; under project key number for participation in same or similar role.)</td>
</tr>
<tr>
<td>----------------------------</td>
<td>---------------------------</td>
<td>-----------------------------------------</td>
</tr>
<tr>
<td>Laura Morris, MCR, IIDA, LEED AP</td>
<td>Program Executive</td>
<td>X</td>
</tr>
<tr>
<td>Jeffrey Walter, PMP, Assoc. AIA, LEED AP BD+C</td>
<td>Program Manager</td>
<td></td>
</tr>
<tr>
<td>Amy Thompson, AICP, LEED Neighborhood Development</td>
<td>Deputy Program Manager</td>
<td></td>
</tr>
<tr>
<td>Gene Kluesner, AIA, LEED AP</td>
<td>QA/QC Leader</td>
<td></td>
</tr>
<tr>
<td>Roger Frischette, PE, LEED AP</td>
<td>Lead Designer - Architecture</td>
<td>X</td>
</tr>
<tr>
<td>Thomas Gregory, Assoc. AIA</td>
<td>Project Manager - DC</td>
<td>X</td>
</tr>
<tr>
<td>Carl Knutson, AIA, NCARB, LEED AP</td>
<td>Senior Project Designer</td>
<td></td>
</tr>
<tr>
<td>Michelle Manuel, NICUQ</td>
<td>Senior Interior Designer</td>
<td>X</td>
</tr>
<tr>
<td>Adana Johns, AIA, LEED AP</td>
<td>Project Manager - Chicago</td>
<td>X</td>
</tr>
<tr>
<td>Brian Schabel, AIA, LEED AP</td>
<td>Senior Project Designer</td>
<td>X</td>
</tr>
<tr>
<td>Julie Michiels, AIA, LEED AP</td>
<td>Senior Interior Designer</td>
<td>X</td>
</tr>
<tr>
<td>Laurie Butler, AIA, LEED AP BD+C</td>
<td>Project Manager - New York</td>
<td>X</td>
</tr>
<tr>
<td>Craig Sobeski, LEED AP BD+C</td>
<td>Senior Project Designer</td>
<td></td>
</tr>
<tr>
<td>Steven South, IIDA, LEED AP</td>
<td>Senior Interior Designer</td>
<td>X</td>
</tr>
<tr>
<td>Katie Pederson, AIA, CDT, LEED AP BD+C</td>
<td>Project Manager - Atlanta</td>
<td></td>
</tr>
<tr>
<td>Manuel Cadrecha, AIA, LEED AP</td>
<td>Senior Project Designer</td>
<td></td>
</tr>
<tr>
<td>Amy Sicker, RID, LEED AP</td>
<td>Senior Interior Designer</td>
<td></td>
</tr>
</tbody>
</table>

**29. EXAMPLE PROJECTS KEY**

<table>
<thead>
<tr>
<th>No.</th>
<th>TITLE OF EXAMPLE PROJECT (FROM SECTION F)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>GSA Design Excellence, Department of Homeland Security, Agency Headquarters at St. Elizabeths Campus, Phase 1a New Construction + Phase 1B Adaptive Reuse - Washington, DC</td>
</tr>
<tr>
<td>2.</td>
<td>Shanghai Natural History Museum - Shanghai, China</td>
</tr>
<tr>
<td>3.</td>
<td>Bank of America Corporate Center - Charlotte, North Carolina</td>
</tr>
<tr>
<td>4.</td>
<td>Prime Minister's Office - Putrajaya, Malaysia</td>
</tr>
<tr>
<td>5.</td>
<td>Nixon Peabody LLP - Washington, DC</td>
</tr>
<tr>
<td>6.</td>
<td>Federal Deposit Insurance Corporation, Term Contract and Virginia Square Headquarters Campus - Nationwide including Washington, DC and Virginia</td>
</tr>
<tr>
<td>7.</td>
<td>GSA MOBIS and National Engagement Contracts for Workplace Strategy - Nationwide</td>
</tr>
<tr>
<td>8.</td>
<td>National Institutes of Health, John J. Edward Porter Neuroscience Research Center, Phase II - Bethesda, Maryland</td>
</tr>
<tr>
<td>9.</td>
<td>New York City Police Academy - Queens, New York</td>
</tr>
<tr>
<td>10.</td>
<td>GSA, Federal Energy Regulatory Commission - Washington, DC</td>
</tr>
</tbody>
</table>
C. Consultants
Cerami

Cerami & Associates, Inc. Cerami is a premier national acoustical, audiovisual, and technology consulting firm dedicated to providing technically excellent, responsive client service through a work ethic that expresses value, creativity and innovation. Their clients number among world-class developers, top architects and engineers, and Fortune 100 companies. Through our work with these clients, we have earned a reputation for excellence. Cerami has worked for many government and institutional clients, each with very particular and sometimes unique requirements, including the US Courts, the Architect of the Capitol, and the Smithsonian Institute. They are acutely familiar with the GSA’s standards, and are well prepared to work with the mechanical engineers closely to respond to these requirements.

Fox RPM Corp: Fox is a full-service relocation and furniture project management with more than 27 years of experience successfully serving the federal government. Fox provides relocation planning, management and related services to avoid disruption, mitigate risk, control costs and meet the needs of the government customer. Their federal government services practice is located in Washington, DC, and staffs over 35 professional relocation and furniture project managers. In addition, Fox and its parent company, BRG, employs more than 500 people across the U.S. to support the portfolio-wide needs of this IDIQ contract, including offices in San Jose, CA, and Dallas, TX to meet the requirements of the RFP as listed. Fox offers a breadth of resources, experience, expertise, and flexibility to meet the needs of wide range of relocation project types.

Gordon

Gordon: GORDON is a Service Disabled Veteran owned Small Business and is recognized as a leading provider of professional engineering, surveying, landscape architecture, and security consulting services to federal, state, and local clients in the Mid-Atlantic region. Founded in 1976, Gordon has assembled Civil Engineers, Surveyors, Land Planners, Landscape Architects and Security Consultants located with a regional network of offices. GORDON has significant experience in providing on-call services to numerous clients throughout the region. The scope of these services includes facility design, civil engineering, landscape architecture, surveying, planning, and site security. GORDON’s specific federal experience includes 3 consecutive term IDIQ contract for the Army Corps of Engineer completing over 70 task orders; over 20 task orders for the Smithsonian Institution National Zoological Park; over 30 task orders at St. Elizabeths; and 15 task orders at the Customs and Border Protection Advanced Training Center Campus.

Interface Engineering

Interface Engineering: From four employees in 1969, Interface Engineering has grown into a nationally recognized, multi-discipline consult with over 180 professionals in five offices. They focus on high-performance, pragmatic design, and to date have completed 130+ LEED certified projects and 18 Net-Zero buildings. Interface’s integrated teams have a long history of working with governments at the regional, national and international levels. Whether it’s a new facility or an upgrade, Interface focuses on timelines, cost-conscious designs that result in facilities that work harder, last longer, save resources, and bring the best value to the community. When approaching a project with great public interest, Interface is sensitive to the needs of both our client and those in the affected community. They actively participate in community meetings, project steering groups, and design charrettes to determine a plan of action in sync with all stakeholders that meets the functional and aesthetic goals of the project. To serve their clients and community, they use integrated design to create sustainable solutions that not only perform beyond expectation, but also lead and inspire. Their mission is simple: to help build optimal environments for life.

Jensen Hughes

Jensen Hughes: JENSEN HUGHES is a global leader in fire protection engineering and code consulting services for the built environment. They provide fire protection code consulting, building and life safety code analysis, fire protection systems design, security design and engineering, risk assessment, commissioning, forensic, environmental, security, research, development and testing services. Their capabilities stem from a highly skilled, experienced senior engineering staff, their continued involvement in all aspects of model building codes and standards processes (e.g., ASTM and NFPA), and their experience in the application of federal and state and local government requirements, as well as international standards. JENSEN HUGHES has 20 years of GSA project experience including all 11 GSA Regions. Headquartered in Baltimore, JENSEN HUGHES was founded in 1980 and has grown to 820 professionals providing services from more than 20 major city branch locations as well as additional satellite offices.
F. Small Business Plan

The team understands and shares GSA’s commitment to small, disadvantaged business enterprises. We have a proven track record of employing these enterprises on our project teams. We are confident in our ability to meet the goals stated in the solicitation for all Small Business subcontracting for this contract. We are confident in their abilities to provide design services commensurate with the importance of the GSA Nationwide
DEPARTMENT OF STATE

RESPONSE TO REQUEST FOR PROPOSALS FOR DOMESTIC AE SERVICES IDIQ, SOLICITATION NUMBER: SAQMMA-15-R0267

MAY 28, 2015

03. PROFESSIONAL QUALIFICATIONS
The Perkins+Will team understands and shares the Department of State’s commitment to small, disadvantaged business enterprises. We have a proven track record of employing these enterprises on our project teams. We are confident in our ability to meet the goals stated in the solicitation for all Small Business subcontracts for this contract. We are confident in our ability to provide design services commensurate with the importance of the DOS IDIQ contracts. Each firm has been selected for this team based on the value that they will add, not their small business status.

**CONSULTANT PROFILES**

**FACILITIES PLANNING / VALUE ENGINEERING / ENERGY ANALYSIS + ENVIRONMENTAL ASSESSMENT**

The Building People is a full service facilities management and real estate organization (HubZone, MSE, DBE) that prides itself on 20 years of experience operating, maintaining, providing service and space solutions that are needed for both building owners and their customers. With a vision toward portfolio optimization through connected real estate and a well skilled workforce, their service is built on a platform that enables end users and clients to maximize technology while changing the tenant experience, improving utilization and organizational results. Whether its operations or strategy and program support, they have the unique ability and skill sets to provide solutions to building owners and occupants.

Their six key practice areas include: Real Estate Services, Facilities Management Service & Support, Energy & Sustainability, Project Management Support, Financial Management, and Information Technology/Integration.

Energy Solutions are an easy and cost effective way for building owners and facility managers to make needed energy improvements. Using TBP’s integrated project management process, clients can be sure projects are designed for each customer’s specific requirements and apply a comprehensive suite of integrated, technological infrastructure improvements to a building that result in: guaranteed energy and operating cost savings, increased staff productivity, reduced downtime and equipment costs, reduced environmental impact, and enhanced government compliance.

TBP uses a four-phased comprehensive energy management solution that assists with a variety of energy projects that include renewable and sustainable energy. Phases include: Consulting/ Auditing/Energy management solutions, Concept development and requirements analysis, Implementation and change management, and Measurement and verification.

Currently, TBP is supporting GSA with a nationwide contract: GSA, Public Buildings Service, Building Management Control Systems / GSALink (Smart Building Assessment) - Assessed the GSALink Smart Buildings project that integrates the building monitoring and control systems of GSA’s building portfolio to the GSA network.
### Past Performance Matrix

<table>
<thead>
<tr>
<th>Name of Project</th>
<th>Location</th>
<th>Planned vs. Actual Design Duration</th>
<th>Construction Budget vs. Awarded Amount</th>
<th>Change Order Rate</th>
<th>Client Contact</th>
<th>Proposed Team Members and Consultants Involved with This Project</th>
<th>LEED Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department of Homeland Security, Agency Headquarters at St. Elizabeths Campus, Phase 1A New Construction</td>
<td>Washington, DC</td>
<td>7 mos.</td>
<td>Confidential</td>
<td>Confidential</td>
<td>James Tufftleys Project Manager, GSA/Federal/US/EWS/DC</td>
<td>Tom Gregory</td>
<td>LEED-Gold</td>
</tr>
<tr>
<td>GSA, Tenant Improvements for Department of State, American Red Cross Building</td>
<td>Washington, DC</td>
<td>6 mos.</td>
<td>Uncontracted Budget Awarded: $1,769,227 Final: $1,442,715</td>
<td>1.6%</td>
<td>Mark Goharas</td>
<td>Tom Gregory</td>
<td>LEED Gold</td>
</tr>
<tr>
<td>Linklater’s Law Office</td>
<td>Washington, DC</td>
<td>8 mos.</td>
<td>Budget: $1,250,000 Awarded: $998,599 Final: $939,248</td>
<td>0.7%</td>
<td>Jonathan Lase</td>
<td>Laura Morita</td>
<td>GKT</td>
</tr>
<tr>
<td>Tishman Speyer, International Monetary Fund (IMF) Renovations</td>
<td>Washington, DC</td>
<td>11 mos.</td>
<td>Uncontracted Budget Awarded: $2,137,301 Final: $3,692,319</td>
<td>0.3%</td>
<td>Laura Morita</td>
<td>Tom Gregory</td>
<td>Pat Kazinski</td>
</tr>
<tr>
<td>National Institutes of Health, Porter Neuroscience Research Center, Phase II</td>
<td>Bethesda, Maryland</td>
<td>18 mos.</td>
<td>Budget: $179,000,000 Awarded: $166,569,000 Final: $165,000,000</td>
<td>2.6%</td>
<td>Rita West Decker</td>
<td>Laura Morita</td>
<td>LEED Gold</td>
</tr>
</tbody>
</table>

### Previous Government Experience

**Department of State, Domestic AE Services IDIQ**

### Selecting the Projects

We have selected the following five projects to highlight in this additional government projects section as they tell another portion of the experience that Perkins-Will has with federal clients. These projects are:

1. **Department of State, Overseas Buildings Operations, U.S. New Embassy Compound**
   - Bujumbura, Burundi
2. **Federal Deposit Insurance Corporation Term Contract**
   - Washington, DC, Virginia, and Nationwide
3. **GSA Mission Oriented Business Integrated Services (MOBIS) and National Engagement (NE) Contracts for Workplace Strategy Nationwide**
4. **GSA, Health and Human Services, Workplace Planning**
   - Washington, DC
5. **GSA, Executive Office of the President, Strategic Housing Plan**
   - Washington, DC

These projects have been completed in the past five years, as stipulated in the RFQ. We have included a cross-section of projects including an overseas embassy compound, a term contract, workplace strategy projects, as well as a strategic housing plan. These examples augment the projects included in Tab 04 Specialized Experience + Technical Competence and illustrate the depth of our government experience both locally and nationwide.
Tips and tricks

Tips to improve your material
TIPS TO IMPROVE YOUR MATERIAL

Use InDesign (or Word) to create your materials
Use the templates provided
Customize your firm profile and resumes to the pursuit
Send info in editable files – NOT PDF
TIPS TO IMPROVE YOUR MATERIAL

Include project list with the prime
Track teaming partners to complete “Worked Together” matrix
Invest in professional headshots and project photography
TIPS TO IMPROVE YOUR MATERIAL

Provide technical approach content
Develop fee in timely manner
Post SBE status and portfolio
QUESTIONS?