

## **STUDYING UP FOR EDUCATIONAL WORK**

When clients bring on a professional services firm, it's their obligation to the educational institution they serve to look for the best. They're also looking to save money, so the selection process is highly competitive. Yet some selections are more objective today, and you get a fair break when you present your credentials. Three client from different sectors reveal their selection procedures.

### **Public Sector Client**

The campus planning project manager has different ways to solicit RFQ's and RFP's, depending on whether it's publicly financed or funded through patient revenue. They look not only at the firm's credentials, but at the whole package, including the minority firms involved. They look at how you've done in higher education, and other government work, but warn that the paperwork is tremendous.

#### **The advice:**

"In your presentation, you should pull in a sub firm that can fill in some of those tasks that you can't do as well, but especially talk to groups that have already dealt with us, that helps."

"Usually we receive 25 – 30 proposals that range from a couple of pages that look as if they were prepared by a high school senior, to a well-documented and well prepared proposal. I'm amazed at some of them. You can quickly read them, and select them from a one-page rating system, and I'm shocked that some are so primitive.

It's supposed to get you to the interview, where you can then bring your parties together and show how you've rounded out your team with local people.

Usually we have a mandatory walkthrough. We feel it's very important to see the facility, and review both your questions and other consultant's questions, so everyone is on the same page – that's important to us. Everyone should have the same fair shot.

Now it's your time to be innovative, while staying within our budget. You have to know where the budget is, and build to it. If a great presentation can't justify the budget, it has to be negated."

Remember how you got your first job. You had to match your talents with what the clients needed. That's still the most important part of the whole presentation process.

### **Quasi-Public Sector Client**

In the past when they wanted to build a university building, they only looked at firms with experience building on campuses. They argued persuasively that if a firm had built a hospital, but had someone on staff or partners with college experience, they would qualify for the university project. That opened the door to a lot more firms. Their procedure:

"When we put out an RFP, most firms are listed on our web site, so that gives the small firms time to market themselves to the larger firms. The bad news is that many firms can now do it all, and don't have room for the sub consultant. We now require the prime to carve out fees for WBE's, and minority businesses, and we're not talking about photography and messengering, we're talking about meaningful roles."

They also have an advocate to contact for making an appointment to present your credentials in a half-day session. They provide a room where you can present your experience, and get the peculiarities of each director.

### **Private Sector Client**

This VP of capital construction is responsible for overseeing all the projects that the university does, from inception through design and construction, and turning over the projects to their clients. Their clients are the deans, faculty and students.

"Our challenge is to provide value to the process and to the project. A college and university setting is in a competitive environment, as opposed to elementary, middle, and high schools. You have to deliver the product in terms of program, educational resources, and facilities that are competitive with other educational institutions. We want to have facilities that can compete with the best."

“Each of our projects goes through a very competitive process. When we selected a design team, we looked at 21 different firms from their basic competencies; experience working in an urban university setting, and working in the type of building that we wanted built? We received the proposals, brought everyone in for interviews, gave everyone a project specific homework assignment. For example, on a wellness center, the assignment was to study the absolute maximum number of seats you could get into the facility for an NCAA Division 1 basketball game. How much would that impact on the space for the wellness component, or the recreation area? Seeing how firms met that challenge, and the solutions they proposed, really factored into our ultimate review and rating of the firms.”

Do your homework. Get to know the people, begin to build the relationship with the people at the facility, the plant engineer, and learn how it all operates. Show your concern to learn as much about the institution as possible. This doesn't get you the job without the right credentials, but it is a vital part of the process.”

The smart firm will go to the site, look around, and record the traffic patterns, both inside and around the facility. Include all that in the RFP, it will look good. They're looking for substance in an experienced-based selection, rather than bells and whistles. It shows an effort; you're not just pulling your chemistry building from another project submittal. You've customized it, and have come up with something truly innovative.