Housekeeping Rules

WELCOME & INTRODUCTIONS

IDOT Statements of Interest

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Illinois Tollway DIVERSITY
Driving Economic Opportunities

Illinois Tollway

SOI Feedback

Illinois Department of Transportation's

UPDATED

Jack Elston and Jenni LeSeure

Monday, July 31, 2023

Illinois Department of Transportation

Discussion

- SOI Changes since PTB 206

- Updated SOI Feedback

- Q & A

DISCLAIMER

Before we get into the feedback portion for SOI's, we   want to iterate that you could follow all the suggestions   and comments building a perfect SOI but still not get   selected.

These are simply pointers to help strengthen your SOI,   and nothing is guaranteed.

(No magic formula)

CHANGES MADE

PTB 206 we implemented some SOI Changes
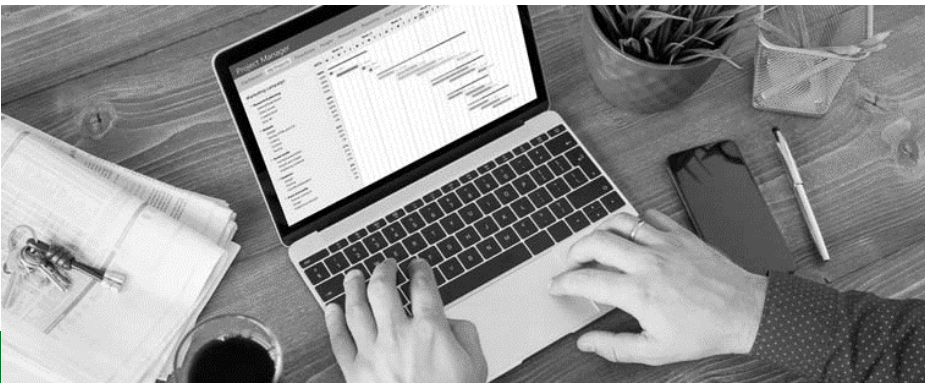
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Changes

Result from working with ACEC IL DOT/Tollway SOI Process Subcommittee of the Innovations Committee.

Implemented PTB 206 (November 2022)

High level major changes:
1. 2 page Intro
2. Org Chart
3. Exhibit A
4. Resumes
5. Project Experience
6. Attachment #4

SPECIAL THANKS

To the IDOT Districts & Bureaus:

Who took the time to fill out the survey and provide honest feedback for the firms.

Without them, we wouldn't have this information to share with you today.

FEEDBACK

With a touch of honesty...

2 Page Intro

*1. Briefly describe your firm's interest in performing the work selected in the PTB/Item Number. (This description is a PDF file, and **_shall not_** not exceed two pages. Submittals exceeding two pages will not be accepted.)

Select...

1. Enforcing 2-page limit

2. If exceed will not accept your SOI

2 Page Intro

Common questions we get:

1. Do I include my approach here if it's not requested?
   - *If it's not requested, you can include a short approach here, we try during Ad review catch any job specific jobs to include a project approach and understanding. Not so much for work order.*
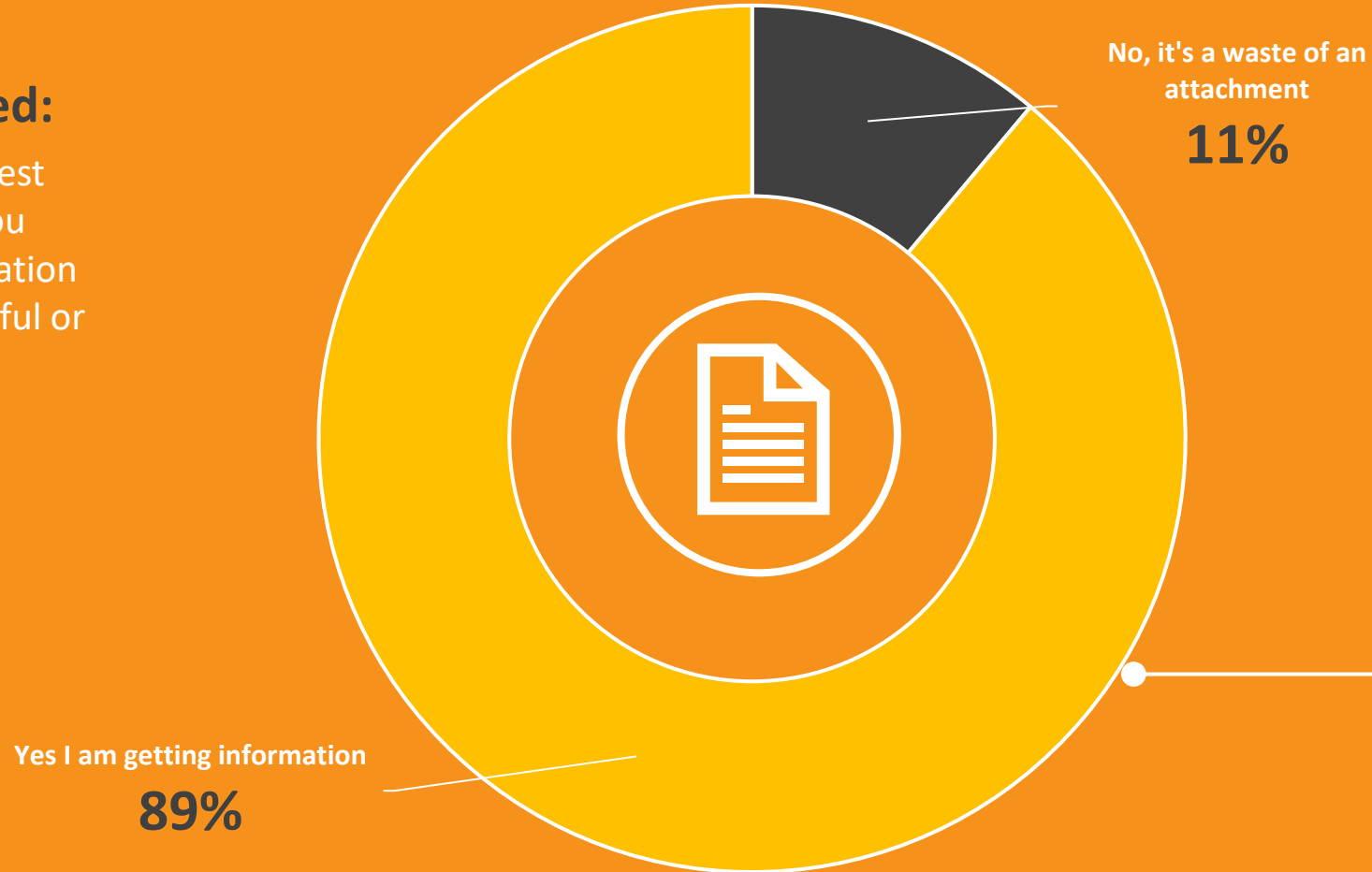
2. What do we include?

   - *Let's take it to the Districts….*

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Feedback

What the Districts/Bureaus' preference is.

Question Asked:

2 page Firm's Interest attachment: are you getting any information from this, is it helpful or just a waste of an attachment?

No, it's a waste of an attachment

11%

Yes I am getting information

89%

My 2 Cents?

Don't overload or stuff the space with word fluff – keep it simple well laid out…

Don't take my word – let's hear from the Districts

What would you like to see?

In 2 page intro letter....

Direct Feedback

"…An **_executive summary_** of their firm, which subs they are using and what each will be utilized for…"

- District Employee

Direct Feedback

"...*__Highlights__* of key staff, knowledge of what the project is, list of subs, DBE percentage proposed...."

- District Employee

Direct Feedback

"...I honestly rarely look at this document unless I cannot figure out key staff from the org chart...."

- District Employee

Direct Feedback

"...I think it's a waste, or too cover letter like....."

- District Employee

Direct Feedback

"...Specifics to the project, similar projects they have worked on, and no sucking up......"

- District Employee

Org Chart

*2. Attach a **_one_** page Organizational Chart (no resumes).

If the advertisement requests a Project Understanding and Approach to be provided, include here behind the required organizational chart, this should not exceed 5 pages.

[ ]

Select...

1. Mandatory

2. One pager

Org Chart

Common questions we get:

1. Do we show just the Exhibit A staff?
   - *No, you can include more than what the ad requests on the org chart*
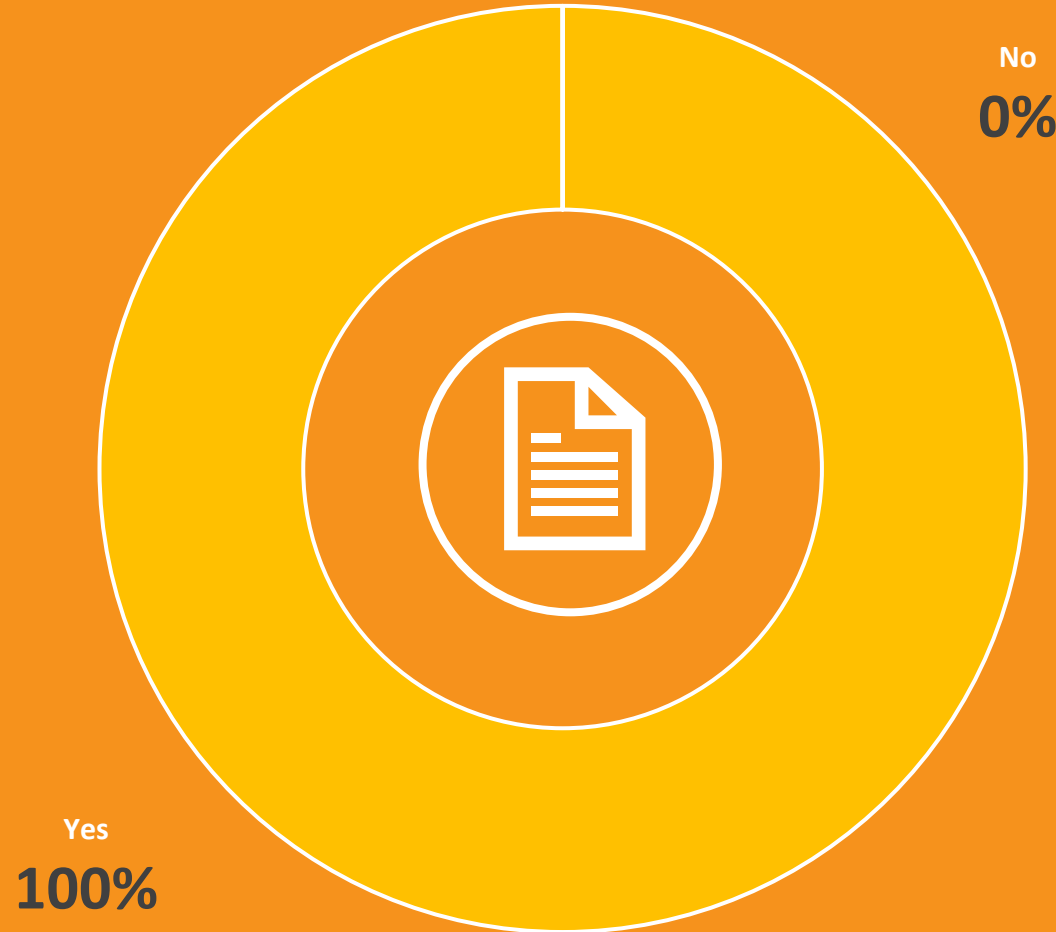
1. Do we need pictures of our team?
   - *No, you can display it simple, or as beefed up design as you want, there is no specifics, just one page.*

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Feedback

What the Districts/Bureaus' preference is.

Question Asked:

Org chart: since being made mandatory, are you getting the information needed from this?

No
0%

Yes
100%

My 2 Cents?

Make sure you show your subs and where they are at in the hierarchy

Direct Feedback

"...We have noticed a couple instances where a firm listed staff (phase III) that we know are already assigned/working on an existing project, so the employee is _**not actually available**_ for the new contract.

And in some cases the listed staff no longer work for the firm. We are only aware of this in a couple cases where the district was familiar with the firm and its staff, so mandatory Org chart _**made it possible**_ for us to notice   the discrepancy."

- District Employee

Exhibit A: Key Staff

Key personnel listed on **Exhibit A** for this project must include:

1. Show **ONLY** those staff we id in ad

2. Do **NOT** include extra staff

Exhibit A: Key Staff

Common questions we get:

1. For structures it says "..the person who will perform the structure plan prep….in additional, the staff performing this work." Do I include more than 1?

   - *Yes, you identify the individual who oversees the structure plans, and ANY additional staff that will assist with this function. So could be 1, could be 5 – depends on your proposed team.*
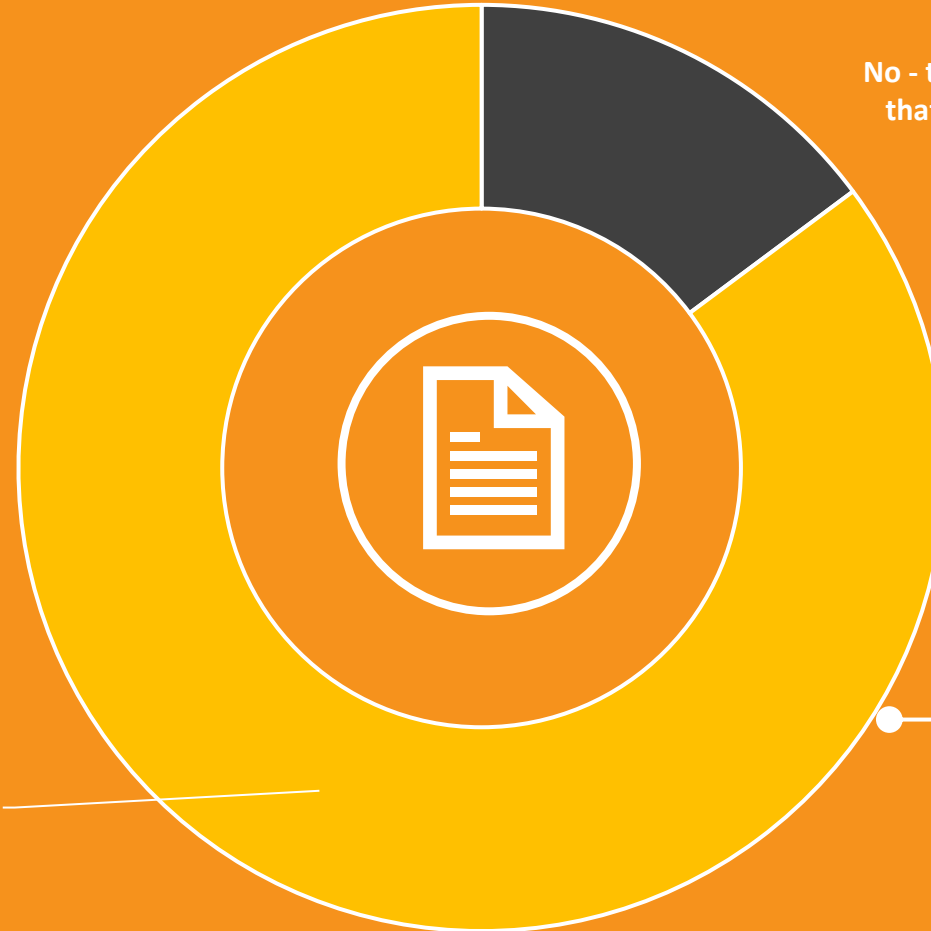
Feedback

What the Districts/Bureaus' preference is.

Question Asked:

Exhibit A Key staff: are firms listing only those individuals you ask for within the ad?

No - they add extra staff that is not requested

15%

Yes - for the most part they follow the ad

85%

My 2 Cents?

STOP adding extra people – follow the ad and do not include more than what the District person is asking for and keep the resumes to 2 pages.

Direct Feedback

"...I think the _**focus**_ now should be to remind firms of   what
we are asking for so we don't get extra resumes or ones that
are 10 pages long....."

- District Employee

Project Experience

3. Summarize any experience of the staff or firm(s) (prime and sub work combined) in accomplishing similar types of work within the last **10** years. This information should be concise and relevant to the expertise required for this specific project.

Attachment **shall not** exceed **20** pages.

Select...

1. **LIMIT** to 20 pages

2. Must be Prime **AND** Sub combined

3. IF it's specified in the ad, then only show 10 projects for the team combined

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Project Experience

Common questions we get:

1. Is there a project limit?

    - *No unless it's specified in the ad, just a page limit.*

The Statements of Interest must also **include**:

- The Consultant's relevant projects completed by the firm within the past ten (10) years by members of the Consultant's' key personnel listed in the SOI. Do not include more than ten (10) relevant projects.

Project Experience

Common questions we get:

2. The Ad says "…do not include more than 10 relevant projects…" What should I do?
   - *Include 10 projects, no more (can be less) and can be spread across 20 pages, but no more than 10 projects combined by your Prime and Subs.*

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Direct Feedback

"...I like numbers of projects completed in [that] expertise Example 5 cable stayed bridges and their locations because you can then establish a milestone to check and need to mention their involvement: major designer or a small task completed..."
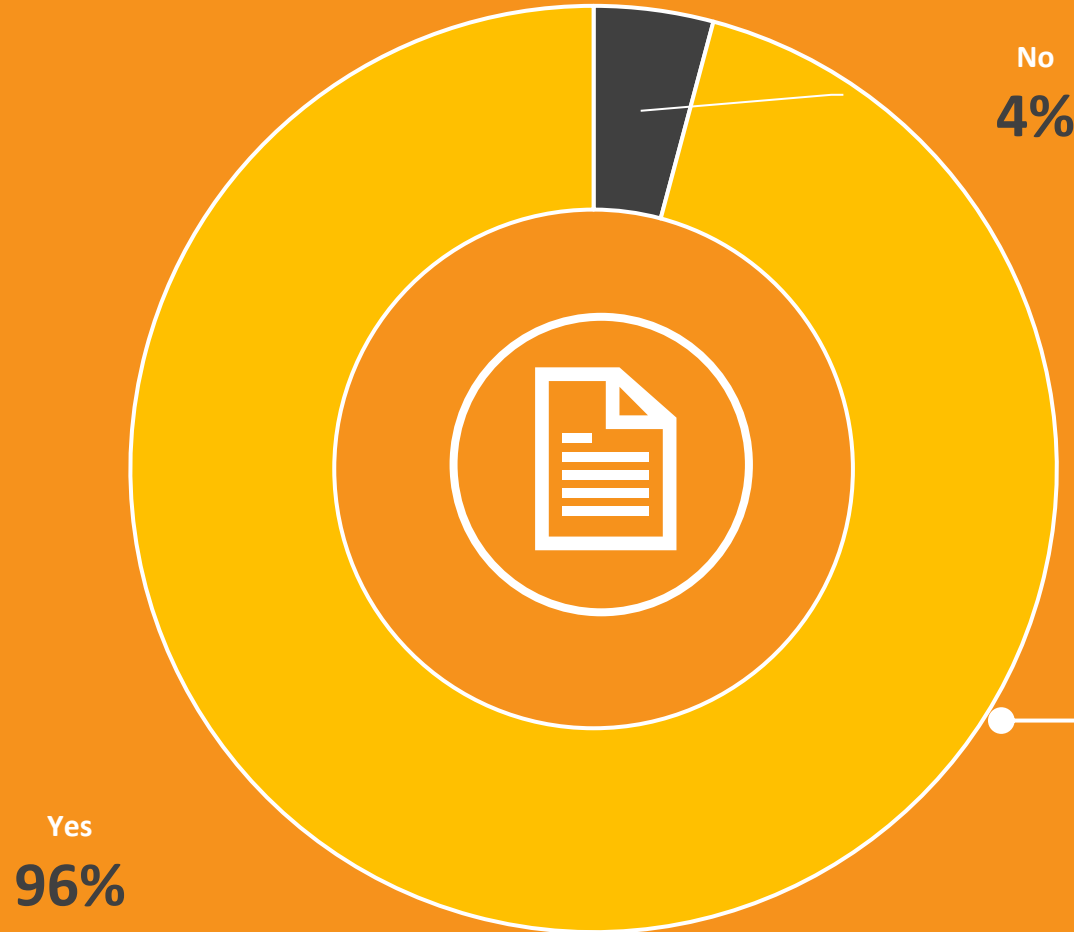
- District Employee

Feedback

What the Districts/Bureaus' preference is.

Question Asked:

Project Experience: are firms following directions and supplying the limits set within the advertisement?

No
4%

Yes
96%

My 2 Cents?

Remember "If I was reviewing all of these, would I want to read all of this and have the time?" Make your firm stand out, keep it simple and easy to read.

Additional Info

The Statements of Interest must also **include**:

4. Unless additional information is required within the advertisement this field should be *blank*.

Teaming Agreements if applicable should be included here.

Select...

*2. Attach a *one* page Organizational Chart (no resumes).

If the advertisement requests a Project Understanding and Approach to be provided, include here behind the required organizational chart, this should not exceed 5 pages.

Select...

1. Attachment #4 should be blank **UNLESS** something is requested within the ad

2. Project Approach is **bundled** with Org Chart

Additional Info

Common requests:

*2. Attach a **one** page Organizational Chart (no resu

If the advertisement requests a Project Understandin
organizational chart, this should not exceed 5 pages.

Select...

The Statements of Interest must also **include**:

- A Project Understanding and Approach, describing in detail on how the Consultant will accomplish the work, including any work that would be performed by a Subconsultant(s).

- The Consultant's relevant projects completed by the firm within the past ten (10) years by members of the Consultant's' key personnel listed in the SOI. Do not include more than ten (10) relevant projects.

3. Summarize any experience of the staff or firm(s) (
within the last **10** years. This information should be c

Attachment **shall not** exceed **20** pages.

Select...

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INFO REQUESTED IN AD

When we put these statements in the ad (project approach/experience etc) are you seeing this in firm's submittals? If so it is good information or waste of time?

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Direct Feedback

"...***Good information*** when they have the time to show interest in the project. You can tell that some are just canned statements used Statewide 😖

- District Employee

Direct Feedback

"...Great information. *__Useful__* in breaking ties among applicants...."

- District Employee

Direct Feedback

"…When they add the info on approach, we definitely   use it in our evaluation. …."

- District Employee

Direct Feedback

"...Yes, and it's excellent information. Project approach _**helps**_ set firms apart from one another. I like seeing if   the firm has done some research about the project and   the community it will impact.

I have also had the opposite happen where they discussed scope not included in the ad and scored the   firm much lower for project approach and understanding..."

- District Employee

DO YOU FEEL SOI SUBMITTALS HAVE IMPROVED OVER THE YEAR?

Direct Feedback

"...I think so. Almost all companies have submitted org charts and have submitted org charts that are clear. If a company can't do that, I am ***not interested*** in selecting them...."

- District Employee

Direct Feedback

"...Overall, _**yes**_. There are some firms that always submit, and the submittal has not improved. For those, it feels like a canned submittal, and they are just hoping to get lucky to be selected....."

- District Employee

Direct Feedback

"…Yes, shorter and quicker to go through, just sometimes a lot of submittals…"

- District Employee

Direct Feedback

"…__YES__. By updating the requirements, consultants couldn't use their old flawed documents for stuff like approach or understanding, and they updated them to actually be project specific. Also, we can actually figure out what person is doing __each task__…"

- District Employee

ADDITIONAL COMMENTS

What else do the Districts have to say?

Direct Feedback

"...It is nice to see firms submit who are from outside of our District. For items that require travel to projects, like a Var Var Survey contract, I'd like to see a statement that shows from what office(s) the field staff is based.

Also, for Var Var contracts, where sub-consultants are included, I'd like to have a better explanation of what roles/ tasks the prime and subs will do..."

- District Employee

Direct Feedback

"...I appreciate the efforts that are being made to improve the process. With the size of the program we   have been tasked to deliver and our staffing woes,   anything that can be done to streamline the process is   welcomed. Thanks!"

- District Employee

Q & A

At this time take questions

Thank you

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Consultant Services Unit Chief

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QUESTION & ANSWER SESSION

DIVERSITY AND STRATEGIC DEVELOPMENT

Programs
- Business assistance
- Mentoring and training
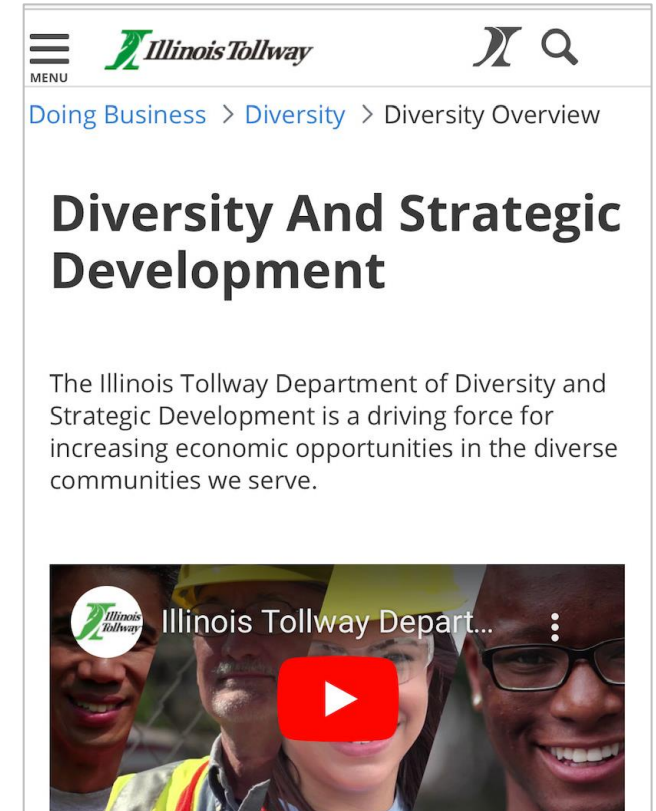- Construction industry training and hiring opportunities

Initiatives
- Virtual outreach sessions
- Training webinars
- Contracting opportunity emails

Register for Tollway Diversity alerts!
- lperez@getipass.com

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