

SOI Illinois Department of Transportation's Feedback

Jack Elston and Jenni LeSeure

Monday, November 9, 2020



Illinois Department of Transportation

Agenda

- Introduction
- SOI Feedback
- Reminders
- Q & A
- Closing

INTRODUCTION

Before we dive in - a few things....

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)



The Survey

We reached out to the IDOT Central and District Offices across the state to supply feedback about firm's SOIs.

As you are well aware, IDOT does not do debriefings on SOI's and this will hopefully shed some light and give some helpful pointers to make your submittals stronger and more effective.

The District and Bureau offices who advertise the projects are the ones who rate/review your SOIs. We asked them five questions:

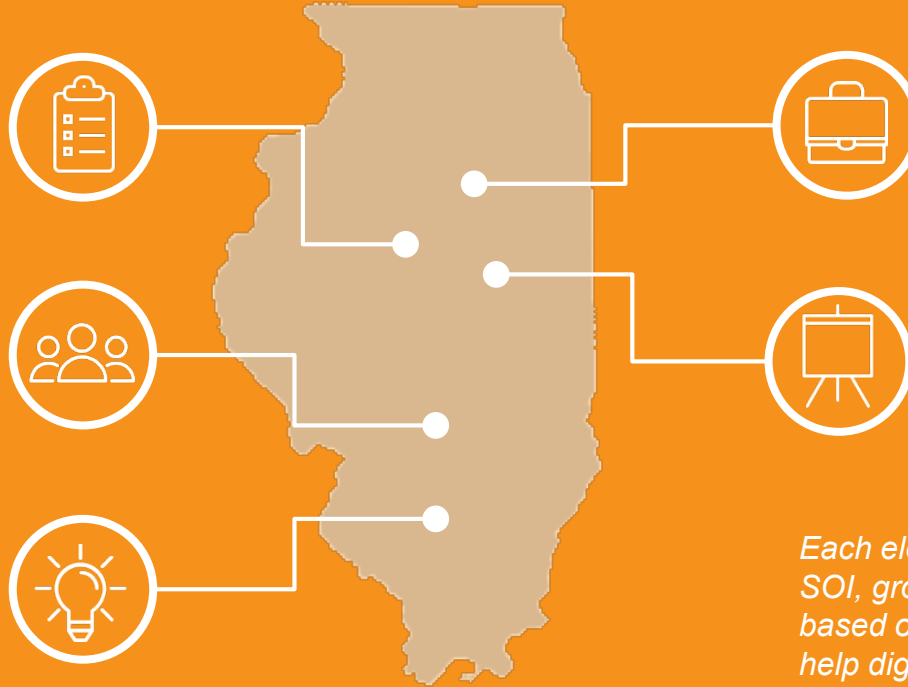
1. What makes a SOI strong when you are reviewing them?
2. What irks you the most when reviewing SOIs?
3. What would you like to see more of in a SOI?
4. Do you take the 2-page limit seriously?
5. Org charts - are they important when reviewing a SOI?



Feedback

Broke down each question and its feedback into 5 “elements”

- Instructions**
Follow and provide what is asked?
- Staff**
Have strong personnel and/or Team?
- Understanding**
Grasps what scope of ad is & satisfy the need of the Department



- Experience**
Has relevant experience/knowledge to accomplish project
- Presentation**
Organized, creative, & convey firm's plan

Each element makes up the SOI, grouped the feedback based on these elements to help digest the information.

QUESTION # 1

What makes a SOI strong when you [IDOT] are reviewing them?



Instructions

1. Addresses the criteria within the ad
2. Lists the key staff as requested



Staff

1. Individuals have capacity to perform the work
2. Detailed plan of who is going to do what task
3. # of years staff has with task or similar work
4. Strength and experience of team and subs
 - *Not just the Prime*
 - *Strong overall team = important*

Direct Feedback

"...Strong SOIs will clearly and concisely discuss at a high level the Prime and **their ability** to manage their Subs as well as describe the roles of all firms..."

- *District 5 Employee*



Direct Feedback

"...They create a team that can be utilized fully and is suited for the scope of work, also finding the right size and quality team for the various/various helps..."

- District 1 Employee





Understanding

1. Approach and anticipate issues for work
 - *Identifies key issues*
 - *Offers solutions to potential problems*
2. Detailed strategy to tackle the project
3. Did their homework, read & understands ad
 - *Research & visit Project Location (job specific)*
 - *Review Phase 1 documents*
4. Conveys clear understanding of scope
5. Experience/knowledge in Department policies

Direct Feedback

"...how the consultant plans to achieve the project goals. Whether this is in the form of thinking of alternative solutions to a particular component of the project, or identifying key issues and providing experience staff in those areas..."

- District 1 Employee



Direct Feedback

"...When a consultant does field check, reviews Phase I report and puts effort into SOI. They identify ideas and provide potential solutions..."

- District 1 Employee





Experience

1. Work/past projects relate to scope
 - *relevant to advertisement*
 - *tailor experience towards scope*
2. How experience applies and makes them the best candidate
 - *Think of it as an "interview" - relate*

Direct Feedback

"...for example Phase II Plan Preparation experience information is good to know and other discussions concerning Phase I, but Phase III is **not relevant** experience..."

- *District 1 Employee*



Direct Feedback

"...For example if a firm does not have a lot of experience in traffic studies did they bring on a subconsultant that has that experience..."

- *District 1 Employee*



Direct Feedback

"...I want to know not just what project they worked on, but what role did they have on that project. What did they do? ..."

- District 8 Employee





Presentation

1. Organized
 - *Utilize attachments in EPAS*
 - *Flow*
2. Demonstrates amount of interest
 - *Time invested in SOI*
 - *Prove they should be the chosen firm*
3. Not too wordy, but to the point, no "word fluff"
4. Well written

Direct Feedback

"...The submittal should show a clear understanding of the duties, personnel and equipment required. Don't make us guess anything, spell it out clearly."

- *District 1 Employee*



QUESTION # 2

What “irks” you [IDOT] the most when reviewing SOIs?



Instructions

1. Not seeing org chart – a hierarchy
 - *Will expand on this later*
2. Exceeding 2-page limit
 - *gets to be too much*
 - *Will expand on this later*
3. Wrong: PTB #, item, district listed

Direct Feedback

"...Not providing something *specifically asked* for within the ad - such as experience in ABC bridge methods or experience in CSS..."

- *District 8 Employee*





Staff

1. Listing personnel that is not available
2. Use of overcommitted personnel
 - *From Subs as well*
3. Bait and switch
4. Using old org charts
 - *Staff that left the company*
5. Staff not compatible to scope of work

Direct Feedback

"...When teams are established that are *not suited* for the work. For example if the project is primarily structural work and roadway and then they add subs for lighting/signals - that scope is not included? They basically set up a team that won't work based upon the scope of work..."

- *District 1 Employee*



Direct Feedback

“...Having *too many subs* working on different tasks is counterproductive and usually more coordination and waiting periods come with it...”

- *District 1 Employee*





Understanding

1. Resumes and proposals are generic
 - *Submitted on multiple items*
 - *Not crafted for a particular ad*
2. Doesn't address a tight project timeline
3. No details on the firm's understanding of the project

Direct Feedback

"...Repeating scope of work with no effort put into how the firm will approach the work or what differentiates them from other firms."

- *District 9 Employee*





Experience

1. Incomplete descriptions
 - *Of applicable experience*
 - *Not tailored*
2. Not listing roles

Direct Feedback

“...When unnecessary information is included. For example, it's good to include in a SOI a project manager who has x number of years of experience, but if the experience is *not related* to highways, they shouldn't describe those projects....”

- *District 3 Employee*



Direct Feedback

“...Listing projects under individuals' project experience without stating what their roles were. Were they the project manager? Or a support role such as some storm sewer design?...”

- *District 8 Employee*





Presentation

1. Cut and paste
2. Cookie cutter letters
3. Too generic
4. Spelling / Grammar errors

Direct Feedback

"...it's especially disappointing if I'm reviewing multiple advertisements that a consultant has bid on and I see it's the same exact SOI on everyone..."

- *District 8 Employee*



Direct Feedback

“...Formatting. Some excellent firms have been rated low because their package was not put together well...”

- *District 2 Employee*



QUESTION # 3

What would you [IDOT] like to see more of in a SOI?



Staff

1. Strong teams
2. Less fluff on resumes

Direct Feedback

“...What is the team going to bring to the project...”

- *Central Office Employee*





Understanding

1. More project specific data
 - *Do your homework*
2. Impacts to the stakeholders
3. How firm is going to accomplish the project

Direct Feedback

“...What are the major obstacles that they anticipate and what's the *plan of attack*? Give me something that I didn't see...”

- *District 1 Employee*



Direct Feedback

“...A detailed *plan* of the workflow and reaching milestones. Something that gives us *confidence* that the consultant can provide high quality services in a timely manner...”

- *District 7 Employee*





Experience

Discuss issues and relate it back to the firm's experience

Direct Feedback

“...For Various Surveying contracts, it's helpful to know **how long** they've been using Bentley MicroStation SS4 (Select Series 4 software) and for future contracts, ORD (Open Roads Designer)...”

- *District 6 Employee*



Direct Feedback

“...The most critical thing for me, is *team dynamic*, interaction. After reviewing 33 submittals for a var/var contract the projects listed all start looking the same. Everyone does bridges, everyone does culverts, etc. I only really want to know what makes you *different* from another firm...”

- *District 2 Employee*





Presentation

Presentation can either break or make a firm.

For example in an oral presentation given on a specific item, a firm came in with their presentation and wiped the table clean of competition.

Their approach, understanding, plan of attack, stake holders, organization – it blew the competition away. Presentation had great balance on experience and approach.

QUESTION # 4

Do you [IDOT] take the 2-page limit seriously?



2-Page Limit

Is the 2 page limit a deal breaker? Every PTB we have the same question – how seriously do you take the 2-page limit when reviewing SOI? Will I be disqualified if I exceed it?

The SOI states in the instructions:

ABC Corp. Help Logout

Statement of Interest

PTB Number
197
IDHR Number

[PTBItem: 1](#)

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

Select...

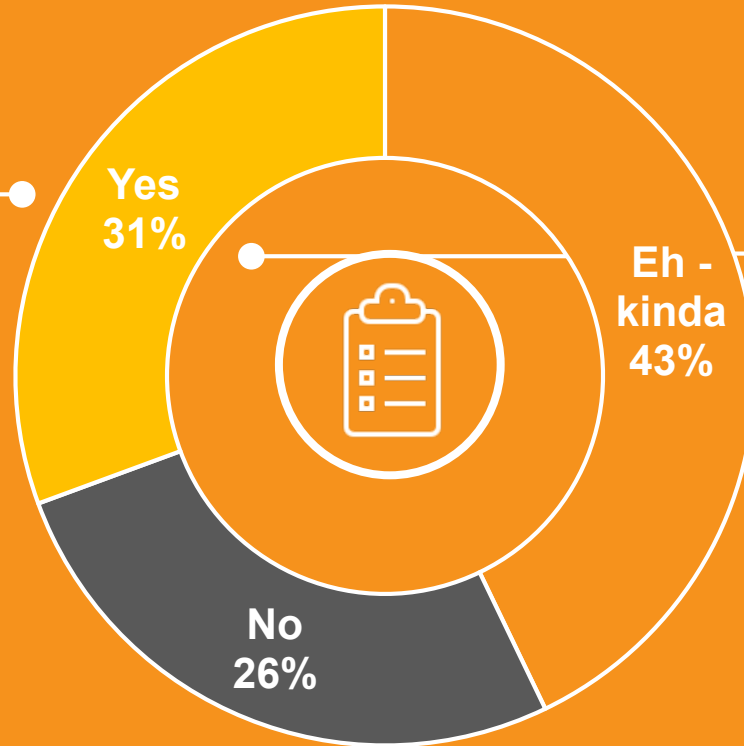
Feedback

What the Districts/Bureaus' preference is.



Overall?

At the end of the day, it's the firm's responsibility to interpret the instructions as they see it and their choice.



Eh -
kinda
43%

My 2 Cents?

Keep it to 2 pages, you have other attachment fields you can add information to.

QUESTION # 5

Org charts – are they important when reviewing a SOI?



Org Charts

Again this is another big question we get from the firms – is it a requirement? When looking at the instructions for SOIs it is not a requirement, but optional.

After talking to Districts/Bureau most find the org chart to be extremely beneficial and gives a high level summary of the hierarchy being proposed.

2. Attach Organizational Chart and/or any needed photographs as one PDF file showing pictures of previous work done or plans. ***(This section is optional. For multiple pictures, please place into one PDF file and attach. Recommended maximum file size limit of 6MB or less.)***

Select..

Feedback

What the Districts/Bureaus' preference is.

Overall?

Assume it's safe to say 80% find it very important and beneficial to include an org chart.

Eh - kinda
not a deal
breaker
12%

No
8%

Yes very
80%



My 2 Cents?

Recommend if you can, include an org chart. It paints a good picture for IDOT & a quick tool to digest a lot of information quickly.

REMINDERS

Few things to also keep in mind when submitting SOIs



Deadline

1. Do **NOT** wait last minute to submit
2. Try to be early
3. Plan for “Computer/internet” failure on your end
4. IF teaming make sure partner submits (communicate)



Emails

1. Just because SOI is submitted – not over
2. Additional Information
3. Make sure email address is correct
4. Be responsive
5. Financial vs Non-Financial Contact

Thank you to those firms who respond quickly!

Financial and Non-Financial Correspondence

It may be necessary for an employee of IDOT to contact the firm for Statement of Interest submittal questions. Please provide contact information below to whom these questions should be addressed.

Financial Representative

	First Name	Last Name
*Authorized Representative:	<input type="text"/>	<input type="text"/>
*Email:	<input type="text"/>	
*Email Verification:	<input type="text"/>	

Non-Financial Representative

	First Name	Last Name
*Authorized Representative:	<input type="text"/>	<input type="text"/>
*Email:	<input type="text"/>	
*Email Verification:	<input type="text"/>	



Obligations

1. In 000's (not whole numbers)
2. List projects you were just selected for
 - *SOI submitted for 197, and selected on 196 – list it please – else I list it for you.*

ONE BILLION DOLLARS





Forms

1. Wait to do the Exhibit A and Sub Plan for last
2. Biggest mistakes:
 - *Categories of subs do not match*
 - *% of work for subs do not match*
3. Disclosure & Iran be sure to:
 - *Sign & Date*
4. Disclosures = be sure the ownership adds up to 100%



Subs

When listing subs, do **NOT** list all the categories of work they are prequalified in within the SOI.

You only need to list the categories of work they are anticipated to work in.

Also make sure your DBE goal adds up before you submit.



Attachments

Based on the SOI feedback, **utilize** the attachments within EPAS effectively to your firm's advantage.

6 attachment fields = 4 you have free range

1. Describe interest (2 page limit)
2. Org Chart
3. Summarize experience
4. Summarize any other information
5. Consultant Exhibit A
6. Subconsultant Utilization Plan

Q & A

At this time take questions

CLOSING

Few items to wrap up with

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.

Thank you



Jack Elston

Bureau Chief of Design & Environment



Jack.Elston@illinois.gov



Jenni LeSeure

Consultant Services Unit Chief



Jenni.LeSeure@illinois.gov