Working With SDOT: Ready to Prime

Presentation Overview

- Background / Big Picture: WMBE Program
- Getting Ready: FAS
- Perspective from Contracting Staff
- Perspective from Project Managers
- Resources: Lily Keeffe
- Close & Networking

Networking Guide

- SDOT – City Staff
- Yet to Work with SDOT
- Have Presently Worked as SUBS Only
- Have Worked as Primes / Primes & Subs

Background & Big Picture

Edson I. Zavala
SDOT
Manager, SDOT Office of Equity & Economic Inclusion
Contracting with the City of Seattle

FAS PERSPECTIVE

Getting Started

Common things needed to work with the City – whether Prime or Sub

City of Seattle License
Taxes
WA State License (UBI#)
Correct W-9
OBD Registration
WMBE Status
Federal Debarment Check
Secretary of State Corporations Registrations

FAS Discussion Summary: Impact for Primes and Subs

- City of Seattle License
- Taxes
- WA State License (UBI#)
- Correct W-9
- OBD Registration
- WMBE Status
- Secretary of State Corporations Registrations

Getting Ready

Steven Larson
FAS
Department of Finance & Administrative Services (FAS), City Purchasing & Contracting Services
FAS Perspective
Next Steps (Further Info)

- City of Seattle license
  - http://www.seattle.gov/licenses/ge
  - http://www.business-license
- State UBI
- OBD Registration
  - FAS: Julie Salinas
- WMBE Status
  - SDOT: Edson I. Zavala
- Correct W-9 & Taxes
  - Varies / Accountant Services

Consultant Contracting Perspective
Things to Think About as a Prime
- Insurance
- Effort and cost to manage and oversee sub work
- Coordination and submission of timely invoices to City, including WMBE report
- Coordination and submission of rate change requests and staff additions / deletions

Consultant Contracting Perspective
Things to Think About as a Prime (continued)
- Developing relationships with Subs
- Developing WMBE goals and managing to those goals
- Paying subs promptly
- Knowing State and Federal requirements (if applicable)
Consultant Contracting Perspective

Most Common Delays to Contract Execution

- City License or State UBI not current
- Overdue taxes
- Incorrect name and/or address on W-9
- Waiting for information

Invoice Checklist & Sample Invoice

Checklist and Sample Invoices are available online

Denote key areas to take into consideration

Can help ensure your payment will be processed promptly

Sample Invoice

Sample Invoice (Continued)
Consultant Contracting Perspective

Resources
- Contracts and Procurement staff
  - DOT_CCU@seattle.gov
- http://www.seattle.gov/
  - City Purchasing & Contracting
  - Consultant Contracting - Consultant Policies and Templates
- E-Bid and Consultant Connection

CCU Discussion Summary: Impact for Primes and Subs

Project Manager Perspective

Understanding Contract Documentation
Negotiations
Project Capacity & Timing
Things to consider as a Prime and Sub
PM Discussion Summary: Impact for Primes and Subs

- Address RFQ / RFP needs
- Understanding Negotiations
- Understanding Scope & Timing changes
- Liability
- Correct Estimating
- Capacity and Resource Availability to Perform Scope
- Understand City Process
- Track by Task Elements

Project Manager Perspective

Next Steps (Further Information)

Understanding Contract Documentation / City Process
- PTAC
- Lily Keeffe
- Debriefs
- FAS
- CCU
- WMBE Program

Estimating
- PTAC
- SBDC
- Lily Keeffe

Resources/Technical Assistance

- Understanding Available Technical Assistance
- RFQ / RFP Responses
- Bonding / Insurance
- Financials
- Business Documentation

Resources

Lily Keeffe
US DOT
Northwest Small Business Transportation Resource Center (SBTRC)
Resource Summary: Impact for Primes and Subs

- RFQ / RFP assistance
- Understanding Liability
- Understanding Bonding / Insurance
- Business Documentation
- Business Financials
- Technical Assistance
- Access to Capital

Technical Assistance
Next Steps (Further Information)

- Technical Assistance
- Financials
- Bonding / Insurance
- Access to Capital

Close & Networking

- Review of Available Information
- Upcoming SDOT Projects/Opportunities
- Networking

What's Next

Edson I. Zavala
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Manager, SDOT Office of Equity & Economic Inclusion
Resources

City of Seattle Finance & Administration Services (FAS) Purchasing and Contracting Website

SDOT Contracts and Procurement Staff
DOT_CCU@seattle.gov

The Consultant Connection Blog:
http://consultants.seattle.gov/category/bids-proposals/

SDOT WMBE Program Website
http://www.seattle.gov/transportation/wmbe.htm

Northwest Small Business Transportation Resource Center (SBTRC)
https://www.transportation.gov/osdbu/nw-sbtrc

City of Seattle Online Business Directory (OBD)
http://www.seattle.gov/city-purchasing-and-contracting/online-business-directory

Washington State Office of Minority and Women’s Business Enterprises (OMWBE)
http://omwbe.wa.gov/

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- Have Worked as Primes / Primes & Subs
Questions?
edson.zavala@seattle.gov | (206) 684-7949
www.seattle.gov/transportation/wmbe.htm

www.seattle.gov/transportation

OTHER LINKS:
INVOICE CHECKLIST & SAMPLE INVOICE