

THE DESIGN-  
BUILDER'S GUIDE  
TO DESIGN  
MANAGEMENT:

# A Playbook for the Federal Sector



CHARLES PANKOW  
FOUNDATION



# THE DESIGN-BUILDER'S GUIDE TO DESIGN MANAGEMENT: A PLAYBOOK FOR THE FEDERAL SECTOR

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# EXECUTIVE SUMMARY



The role of the design integration manager is relatively new for design-build projects, and federal agencies may not yet fully grasp the significance of the role. As the industry adapts to changing roles and dynamics, it is crucial to recognize the unique skills and competencies required of a design integration manager in the federal sector and the ways these skills and competencies differ from those required by the traditional role of an architectural design manager. As emphasized throughout this playbook, the design integration manager acts as the glue that holds a project together and is critical to the success of federal projects.

Supplementing and building on the foundation of *The Design-Builder's Guide to Design Management*, this *Federal Sector Playbook* is an essential resource for both new and experienced design integration managers navigating the federal design-build landscape. This playbook describes the distinct processes and regulatory frameworks of the federal sector, offers practical insights for understanding the critical role of the design integration manager in the federal context, and details the specific tasks and competencies necessary for design integration managers working on federal projects. Federal owners can also benefit from this playbook, gaining a deeper understanding of the evolving role of the design integration manager and its important impact on project success.

The federal sector is characterized by increased regulatory oversight, cyclical funding, heightened bureaucracy, legacy management processes, and significant security concerns. Federal design-build projects are bound by strict rules like the Federal Acquisition Regulation (FAR), which demands transparency and public accountability. Compliance with requirements like the Buy American Act (1933) and prevailing wage laws adds complexity to project execution. Additionally, political cycles and funding uncertainties necessitate agile management practices that can swiftly adapt to changing priorities and budgetary constraints. In general, the strategic aims of federal clients—which focus on public interest, compliance with legal and regulatory requirements, and long-term community benefits—differ significantly from the profit-driven motives of private entities.

To navigate these unique challenges, the playbook emphasizes the pivotal role of the design integration manager, a professional who must possess a nuanced understanding of federal regulations and be capable of integrating these with project management processes. This role is critical in maintaining compliance with legal and regulatory requirements, facilitating communication among stakeholders, and ensuring project success in the context of the bureaucratic and regulated nature of federal projects. The playbook expands upon the knowledge, skills, abilities, and other competencies required by the design integration manager for federal projects.

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*This playbook expands upon the knowledge, skills, abilities, and other competencies required by the design integration manager for federal projects.*




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In federal design-build projects, the role of the design integration manager spans five distinct phases, each with specific challenges and tasks:

1. The **Proposal/Pre-Award Phase** involves navigating through extensive request for qualifications (RFQ) and request for proposal (RFP) documents to ensure that the proposal meets the detailed federal requirements.
2. The **Post-Award Phase** often involves a lag period before design-builder selection or sometimes before contract award and execution, requiring careful planning and coordination to maintain continuity and prepare for the design phase.
3. The **Early Design Phase** involves engagement with authorities and subject matter experts to align the design with federal standards and resolve any discrepancies with bridging documents.
4. In the **Detailed Design Phase**, the design integration manager oversees design reviews and manages exceptions, ensuring that the detailed design adheres to the RFP and project objectives.
5. The **Construction Phase** is similar to that of non-federal projects but requires adherence to federal regulations and focuses on quality control and stakeholder coordination.

Overall, the playbook serves as a guide to the intricate world of federal design-build projects and as a call to action for design integration managers to equip themselves with the specific knowledge, skills, and perspectives needed to thrive in this unique environment. It underscores the complexity and responsibility of managing design in the federal sector and provides actionable insights for professionals committed to excellence in this field.


To provide a clear overview of the federal design-build process, establish a structured approach to project management, and facilitate efficient decision-making throughout a project's life cycle, the following table organizes the design integration manager's tasks by project phase and notes the frequency at which these tasks must be performed. The highlighted tasks, indicated by a portico icon, represent additional or alternative tasks specific to the federal sector that are not included in *The Design-Builder's Guide to Design Management*.

Phase	Task	Frequency
<b>Proposal/Pre-Award</b>	Review the owner's project announcement and identify the design, supplier, and trade contracting partners	Once
	Negotiate a teaming agreement with all partners	Once
	Assign initial scopes of work to all partners based on the owner's project announcement	Once
	Coordinate with partners to identify project-specific risks and create a risk register	Every few days to weekly until submission of qualifications/proposal submission*
	 <i>Validate and check the proposal against the request for qualifications (RFQ)</i>	Once
	 <i>Conduct debrief and feedback session with federal agency</i>	Once
	Develop a conceptual cost estimate for professional services	Once
	 <i>Validate and check the proposal against the request for proposal (RFP)</i>	Once
	Develop a preliminary schedule for proposal and design deliverables	Every few weeks to monthly until proposal submission
Verify that the design subcontracts to be issued to partners upon award meet the project requirements	Once	

\* Phrasing has been modified slightly from *The Design-Builder's Guide to Design Management* to reflect the unique characteristics of the federal sector

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Phase	Task	Frequency
	Document the initial basis of design and review project program to reconcile the owner’s “ask” with the design-build team’s “offer”	Once
	Manage and oversee the execution of the design subcontracts with partners	Once
	<i>➤ Organize partnering sessions</i>	<i>Once, and then as needed throughout the phase</i>
	Identify and communicate key project expectations to all partners	Once
	Establish a communication plan with partners	Once
	Build a supportive team culture	Daily throughout the project
	Update and manage the project-specific risk register	Every few days to weekly throughout the project
	Refine the schedule for design deliverables	Every few weeks to monthly before design begins
<b>Early Design</b>	Confirm that the design aligns with the project budget	Weekly to every few weeks throughout design
	Set goals for meetings, then plan and organize effective meetings	Every few days to weekly throughout design
	Facilitate meetings with the authority having jurisdiction to discuss project-specific code compliance	Every few weeks to monthly throughout design
	Mediate design questions and concerns between the project designer and the owner	Every few days to weekly throughout design
	Create and maintain a log of design changes and their associated costs	Every few days to weekly throughout design
	Oversee the progress of the design schedule	Weekly to every few weeks throughout design
<b>Detailed Design</b>	Facilitate quality in the design process through design and constructability reviews with internal and external stakeholders	Every few weeks to monthly throughout design
	Document the final basis of design and obtain owner approval	Once
	Maintain morale and refocus the team	Every few days to weekly throughout the project
	Track and monitor the actual design costs	Every few days to weekly throughout design
	Monitor the procurement schedule with the construction team and coordinate deliverable deadlines with the design team	Every few weeks to monthly throughout design
<b>Construction</b>	Bridge design team and construction team efforts to maintain project alignment	Every few days to weekly until project close-out
	Document key design changes and communication with the authority having jurisdiction during construction	Every few weeks to monthly until project close-out
	Facilitate the project close-out documentation process	Every few weeks to monthly until project close-out



# CHAPTER 1: CHARACTERISTICS OF THE FEDERAL SECTOR



Several unique characteristics of the federal sector impact design-build projects. These characteristics can affect how the design-build process unfolds and introduce new responsibilities and competencies for the design integration manager. Being aware of these characteristics will help prepare design integration managers to excel in their role on projects in the federal sector.

Federal design-build projects are characterized by the features described in the following sections.

## Increased Regulatory Oversight

The rules and regulations that apply to designers and design-builders tend to be more rigorous for federal projects than for projects in other market sectors. As a result, federal projects tend to emphasize the following characteristics:

- **Public accountability.** Federal projects involve taxpayer money and are accountable to the public. Each federal project is administered by a contracting officer, who is appointed by the agency initiating the project and has the authority to enter into, administer, or terminate contracts on behalf of the federal government of the United States. As stated in the Federal Acquisition Regulation (FAR) Section 1.602-2, contracting officers are responsible for ensuring the performance of all aspects of the contract, ensuring compliance with the terms of the contract, and safeguarding the interest of the United States. Contracting officers can be held personally liable for the mishandling of federal funds and may be very conservative about the application of oversight rules to avoid perceptions of favoritism or misconduct. Overall, there is a higher level of scrutiny in project spending and a requirement for transparency to ensure responsible and efficient use of public funds. These factors combine to create a more rigorous and controlled environment for federal projects compared to private sector or non-governmental projects.
- **Compliance with requirements.** Federal projects must adhere to a wide range of specific rules, regulations, and standards. The most important are those outlined in the FAR and other relevant laws, such as the National Environmental Policy Act (NEPA). The Davis-Bacon Act and the Service Contract Act mandate the payment of prevailing wages and fringe benefits to workers, which can make labor costs higher on federal projects compared to private sector projects. The Buy American Act (1933) and the Buy America Act (1982) indicate a preference for domestically produced goods and materials on federal projects, which can limit sourcing options and increase costs. These requirements address areas such as procurement, labor standards, environmental protection, safety, and security.

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Compliance with all federal project requirements requires detailed documentation and adherence to specific procedures. Audits and inspections are frequently conducted to verify that contractors are meeting their obligations.

- **Strict contracting procedures.** Federal projects require a competitive bidding process to ensure fair and open competition. This process involves detailed solicitation, evaluation, and selection procedures to choose the most qualified and cost-effective contractors. One implication of this is that the more collaborative design-build contracting approaches, such as progressive design-build, are not typically used in the federal sector. In addition, the approval process for federal projects can be especially lengthy and complex due to the need for multiple levels of authorization and review by various government entities.

## The Buy American Act versus the “Buy America” Acts

The Buy American Act is a federal law guiding how the US government makes purchases. Since its introduction in 1933, it has been promoting the use of products made in the United States and boosting American businesses and workers by making US-made goods the top choice for federal agencies. The Buy American Act created a national preference for the government to procure only domestic materials for use in public construction unless a waiver has been granted. The 1933 Buy American Act applies to direct purchases by the federal government but not by third parties, such as private contractors given procurement funding through government endowments.

Several similar but more specific acts have been passed since 1933 focusing on federally funded transportation projects like the construction of roads and bridges. These provisions are often referred to collectively as the “Buy America” acts. Examples of these acts include the Buy America Act, passed in 1982, or the more recent Build America, Buy America Act, passed in 2023, although other “Buy America” acts have been passed with a similar message: when taxpayer money goes into federal transportation projects, those projects should use materials produced in the United States, such as American iron and steel. These acts are a way to support American industries, especially in the construction sector.

The main difference between the 1933 Buy American Act and the later “Buy America” acts lies in their scope. The Buy American Act serves as the general rule for all government purchases, covering a wide range of products. Meanwhile, the “Buy America” acts are more specialized rules, applying specifically to materials used in transportation projects. The 1933 act is the general guide for buying, and the others are specific guides for construction. The overall aim of all of these acts is to boost American-made goods, and the design-build manager needs to understand them and their implications for federal design-build projects.

For simplicity, the acts offering specific guidance for procurement on federal infrastructure projects are collectively referred to in this document as the “Buy America” acts. However, managers of design-build projects need to understand the key differences among the various acts presented above.

## Federal Acquisition Regulation

The Federal Acquisition Regulation (FAR) is a set of rules and regulations that govern the acquisition process for all federal agencies in the United States when they procure goods and services. The FAR is a comprehensive and detailed set of guidelines that covers various aspects of government contracting, including procurement procedures, contract formation, competition requirements, acquisition planning, contract administration, and more.

Key features and aspects of the FAR include the following:

1. **Procurement procedures.** The FAR provides guidance on how federal agencies should conduct their procurement processes, including the methods for soliciting and evaluating bids or proposals from contractors.
2. **Contract types.** The FAR defines various types of contracts that can be used for different purposes, such as fixed-price contracts, cost-reimbursement contracts, and time-and-materials contracts.
3. **Socioeconomic policies.** The FAR includes provisions related to small business contracting, affirmative action, and other socioeconomic policies aimed at promoting fair and equitable opportunities for various types of businesses.
4. **Contract administration.** The FAR outlines the responsibilities of federal agencies and contractors during the contract administration phase, including reporting requirements, inspection, and compliance.
5. **Ethical and compliance standards.** The FAR contains rules and regulations related to ethics, conflicts of interest, and compliance with laws and regulations.
6. **Protests and disputes.** The FAR provides procedures for handling bid protests and resolving disputes that may arise during the procurement process.
7. **Contract clauses.** The FAR includes standard contract clauses that must be incorporated into federal contracts to ensure consistency and compliance with federal laws and policies.

The FAR is maintained by the Federal Acquisition Regulatory Council (FAR Council), which consists of representatives from various federal agencies. It is continuously updated and amended to reflect changes in laws, regulations, and government policies related to federal procurement. Contractors and government officials involved in federal acquisitions are required to be familiar with the FAR and must adhere to its provisions when conducting and managing government contracts.

The FAR is available to read in full at <https://www.acquisition.gov/>.

## Cyclical Funding

Annual funding and election cycles can significantly impact federal projects in ways that may not be as pronounced in other projects. Some of these impacts include the following:

- **Uncertainty in funding.** Federal projects often rely on annual appropriations from Congress, and the funding levels can vary from year to year. The uncertainty in funding can lead to delays or disruptions in project planning and execution because agencies may need to adjust their budgets based on the approved funding for the fiscal year. In some cases, when the federal budget is not approved before the start of the fiscal year, government agencies may operate under a continuing resolution. This temporary funding measure can limit the ability of agencies to initiate new projects and may result in uncertainty for ongoing projects. Federal projects may face challenges in long-term planning and execution due to the short-term nature of funding cycles. Some projects require consistent funding over multiple years to be successful, but the annual budgeting process can create uncertainties and hinder long-term planning.
- **Political priorities.** Federal projects can be influenced by the political priorities of the current administration and Congress. In election years, there can be heightened focus on high-visibility projects that may appeal to voters or increased scrutiny and congressional oversight on controversial projects due to political opposition. Projects might be delayed to avoid controversy in the lead-up to an election or accelerated to showcase progress during election campaigns. When new political leaders take office, they may change or realign project priorities, leading to shifts in funding and resource allocation that can affect new or ongoing projects. With changes in government leadership, policies related to specific projects may be revised or even canceled altogether, leading to disruptions and changes in project objectives.

## Bureaucratic Complexity

Federal projects typically involve a higher level of bureaucratic complexity than other projects, primarily due to the involvement of multiple government agencies and the need to comply with various regulations and procedures. This bureaucratic complexity is the result of several factors:

- **Government oversight.** Federal projects are subject to oversight by various government agencies, each with its own set of rules, regulations, and reporting requirements. For projects above a certain dollar threshold (which varies by federal agency), the project scope and budget require congressional approval. This multilayered oversight can result in a complex bureaucratic structure. Later in the project, changes to the scope or budget of federal projects usually require formal approval processes, which can be time-consuming and involve complicated bureaucratic processes.
- **Interagency coordination.** Many federal projects involve collaboration between multiple government agencies or departments. Coordinating efforts among different entities can introduce additional bureaucratic challenges. Decision-making in federal projects often involves multiple levels of approval, with different stakeholders and authorities having a say in the outcome. This process can slow decision-making and complicate the bureaucratic structure of the project.

While bureaucratic processes in federal projects aim to ensure accountability, fairness, and compliance, they can also lead to delays and inefficiencies. Design-builders should not be surprised by the higher administrative burden of federal projects and should plan their work with the understanding that approvals and reviews will take longer than those for comparable projects in other sectors. Extra attention can be given during the post-award period to establishing an agreement with the federal client regarding a review and approval process that works for all parties.



## Security Concerns

Federal projects generally have greater security concerns compared to other projects due to their association with the federal government and the potential impact of security breaches on national interests. Some of these security concerns include the following:

- **National security.** Many federal projects are directly related to national security, defense, and intelligence, and some involve the construction and operation of critical infrastructure, military bases, or government facilities. Any security breach in these projects could have severe consequences for the security of the country and its citizens. Ensuring physical security against potential threats is of utmost importance. In some cases, project personnel may need to undergo strict vetting and clearance processes before being allowed on site.
- **Sensitive information.** Federal projects often deal with sensitive and classified information related to national defense, law enforcement, intelligence, and diplomatic matters. Protecting this information is crucial to prevent unauthorized access. Certain federal projects may have international implications and involve collaboration with foreign governments or entities. This can add an extra layer of security concerns related to data protection and information sharing. Federal projects must also adhere to various security regulations and standards, such as those outlined by the Federal Information Security Management Act (FISMA) and other cybersecurity guidelines.

## Inconsistent Awareness of Design Management

Design management is an essential aspect of any design-build project, including federal projects. However, federal projects cover a wide range of industries and sectors, from infrastructure to defense, healthcare, and more, and owners in different sectors may understand the importance of design management to varying degrees. Federal owners in some sectors may indeed have a robust understanding of design management and prioritize it to achieve successful project outcomes. On the other hand, federal owners in other sectors may have limited experience in design management and may exhibit gaps in their awareness of design management practices.

## Different Strategic Aims of Public Sector versus Private Sector Clients

Important differences in the strategic aims of public sector versus private sector clients need to be taken into consideration throughout a federal project. Public sector clients typically aim for transparency, accountability, and adherence to regulations in their projects, prioritizing public interest and community benefits. They often focus on cost-effectiveness and long-term sustainability to serve the broader community. In contrast, private sector clients often emphasize profit generation, market competitiveness, and innovation. Their strategic aims center around maximizing returns on investment, achieving a competitive edge, and meeting the specific needs and preferences of their target customers.

*Strategic aims of private sector versus public sector clients*

<b>Private Sector Client</b>	<b>Public Sector Client</b>
Profit level	Accountability
Improved financial ratios	Transparency
Efficiency	Social involvement
Productivity	Democratic decisions
Market position/share	Equity
Increased dividends	Fairness
Customer retention	Employee welfare
Customer satisfaction	Reduced complaints
Corporate governance	Effective service
Value for money	Benchmark targets

Source: Boyd, D., and E. Chinyio. 2008. *Understanding the Construction Client*. Blackwell Group, Oxford, UK.

# CHAPTER 2: THE DESIGN-BUILD PROCESS



Federal sector design-build projects follow the same progression of phases as outlined in *The Design-Builder's Guide to Design Management*. However, the unique characteristics of federal sector projects described in the previous chapter affect the design-build process. Some of these specific effects are summarized in the following sections.

## Preference for Fixed-Price Design-Build

As of 2024, the traditional design-build approach with a fixed price established at contract award is the predominant form of design-build delivery used for federal projects, with the use of progressive design-build delivery still quite rare. Federal projects typically require a competitive award process to ensure fair and open competition. This process involves detailed solicitation, evaluation, and selection procedures to choose the most cost-effective design-build team. While price is often the primary factor in the selection process, federal agencies may use best-value selection and consider other criteria, such as the bidder's past performance, experience, and financial stability, to ensure that the bidder submitting the best offer is also responsive and capable of fulfilling the contract requirements.

## Frequent Use of Bridging Documents or a Highly Detailed Program of Requirements

The use of bridging documents is an approach to design-build delivery in which the owner develops comprehensive project requirements, performance criteria, specifications, and sometimes even conceptual design work prior to hiring the design-builder. From the owner's perspective, bridging documents provide a higher level of project definition and detail up front, reducing ambiguity and ensuring that the project's goals and expectations are well understood by potential design-builders. However, because many key decisions are already made in the bridging documents, these documents may also reduce the potential for innovation, creativity, and flexibility within the design-build team.

In addition, bridging documents may contain errors that, when discovered, must be reviewed and corrected by the design-build team during the proposal stage. This is important because these corrections may result in changes to the project requirements. Further, there may be explicit language in the request for proposal (RFP) that states that the bridging documents are provided for the design-builder's guidance and that the design-builder is responsible for any errors or omissions in the bridging documents. It is important that together the design-builder and the owner are clear on which risks and responsibilities are transferred with the design-builder's acceptance of the bridging documents.

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## Heightened Design Scrutiny

Heightened design scrutiny is a significant characteristic of federal projects and is driven by the several factors listed in this chapter that differentiate federal projects from other projects. For the design-build process, this scrutiny takes the form of multiple design reviews performed by the owner and its consultants and stakeholders. The design-build process must also contend with legacy processes internalized by federal agencies that have used the design-bid-build approach for many years.

## High Likelihood of Major Gaps in the Project Timeline

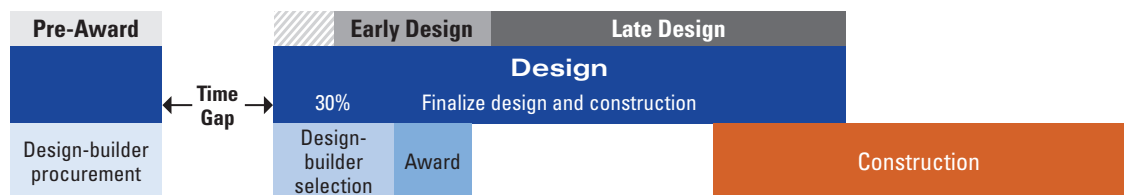
The timeline of a federal project can vary depending on several factors, including the complexity of the project, funding availability, the approvals and clearances required, and the procurement process followed (e.g., the time allowed for a protest period). Specifically, time lags can arise at different points in a project's timeline:

- **Between congressional approval and first solicitation.** This type of delay can result in projects whose information or budgets become outdated while awaiting approval.



*Time gap between congressional approval and solicitation*

- **Between proposal submission and notice of award.** This type of delay can result in a scenario in which a design integration manager that was involved in the proposal phase may no longer be available at the notice of award, creating a potential gap in continuity between the proposal/pre-award and design phases of the project.



*Time gap between proposal submission and notice of award*

- **Between notice of award and contract award.** The notice of award is typically the formal communication sent to the selected bidder indicating that the bidder has been chosen for the contract award. However, awarding the actual contract is a separate process that involves finalizing all contract terms and conditions, obtaining any necessary approvals, and executing the contract documents. This process can result in delays to the start date of the project.



*Time gap between notice of award and contract award*

## **Increased Interaction with the Contracting Officer**

On federal projects, the design-build team will either interact with the contracting officer directly or with one or more project managers acting on his or her behalf. The design integration manager should not take direction from other project stakeholders—especially for items with cost implications—but instead should rely on the direction of the contracting officer.

To perform their duties, contracting officers are allowed a wide latitude to exercise business judgement. Some contracting officers may take a very narrow view of what is permissible in the Federal Acquisition Regulation (FAR), while others may view the regulation more broadly. As a result, the interpretation of the policies and procedures outlined in the FAR may not be consistent from agency to agency.

## **Separation of Owner Stakeholders from the Delivery Process**

Federal projects involve government agencies as project stakeholders, and these stakeholders are usually more involved in oversight and decision-making than in the direct day-to-day execution of the project. It is the role of the contracting officer, not the design integration manager, to manage the relevant project stakeholders and the rules by which the design-build team can engage with them. Some contracting officers may exercise discretion in interpreting FAR clauses, particularly when it comes to allowing confidential meetings or making determinations about change orders.

For the design-builder, this lack of direct contact with the owner can introduce certain challenges when interacting with the contracting officer and the owner's stakeholders. If interaction seems to be limited, the design integration manager should build a good relationship with the contracting officer and take initiative to discuss how to arrange necessary meetings with key stakeholders. It is the role of the design integration manager to manage and integrate stakeholder feedback during the proposal/pre-award and design phases.

## What Does the Federal Acquisition Regulation Say about Confidential Meetings between the Project Team and Government Stakeholders during the Proposal Stage?

One common misunderstanding on federal projects is the belief that the project team is not allowed to have discussions with relevant government stakeholders during the procurement stage. While design-build teams should ultimately follow the direction of the contracting officer, interaction with stakeholders is allowed by the Federal Acquisition Regulation (FAR) as long as these meetings are not part of the selection process. The relevant passage from the FAR is presented below.

### **FAR Section 15.201: Exchanges with industry before receipt of proposals.**

(a) Exchanges of information among all interested parties, from the earliest identification of a requirement through receipt of proposals, are encouraged. Any exchange of information *must* be consistent with *procurement* integrity requirements. Interested parties include potential *offerors*, end users, Government *acquisition* and supporting personnel, and others involved in the conduct or outcome of the *acquisition*.

(b) The purpose of exchanging information is to improve the understanding of Government requirements and industry capabilities, thereby allowing potential *offerors* to judge whether or how they can satisfy the Government's requirements, and enhancing the Government's ability to obtain quality *supplies* and services, including *construction*, at reasonable prices, and increase efficiency in proposal preparation, proposal evaluation, negotiation, and contract award.

(c) Agencies are encouraged to promote early exchanges of information about future *acquisitions*. An early exchange of information among industry and the program manager, *contracting officer*, and other participants in the *acquisition* process can identify and resolve concerns regarding the *acquisition* strategy, including proposed contract type, terms and conditions, and *acquisition planning* schedules; the feasibility of the requirement, including performance requirements, statements of work, and data requirements; the suitability of the proposal instructions and evaluation criteria, including the approach for assessing *past performance* information; the availability of reference documents; and any other industry concerns or questions. Some techniques to promote early exchanges of information are:

- (1) Industry or small business conferences;
- (2) Public hearings;
- (3) *Market research*,
- (4) **One-on-one meetings** [emphasis added] with potential *offerors* (any that are substantially involved with potential contract terms and conditions *should* include the *contracting officer*; also see paragraph (f) of this section regarding restrictions on disclosure of information).

# CHAPTER 3: THE ROLE OF THE DESIGN INTEGRATION MANAGER



For a design integration manager to be successful in the federal sector, several of the competencies listed in *The Design-Builder's Guide to Design Management* are especially important. For example, because of the significant amount of regulations involved in federal projects, knowledge of document management procedures and of contractual terms and conditions is critical. Adaptability is also important to navigate bureaucratic processes, adapt to changing government priorities, and manage the challenges inherent to federal projects.

This chapter outlines the knowledge, skills, abilities, and other characteristics that are especially important for the design integration manager in the federal sector. Competencies unique to the federal sector are indicated by a portico icon.

## Key Recommended Knowledge in the Federal Sector

Document management procedures

Familiarity with applicable local, state, and federal building codes

Contractual terms and conditions



Applicable policies and/or design guide manuals



Compliance and auditing procedures



Dispute resolution and claim procedures



Subcontracting requirements



International trade requirements

Of the recommended knowledge documented in *The Design-Builder's Guide to Design Management*, the following is key in the federal sector:

- Document management procedures
- Familiarity with applicable local, state, and federal building codes
- Contractual terms and conditions, including federal regulations

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*Because of the significant amount of regulations involved in federal projects, knowledge of document management procedures and of contractual terms and conditions is critical.*

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Since federal projects are governed by the Federal Acquisition Regulation (FAR), the design integration manager is expected to be familiar with the specific policies and procedures that affect project delivery. This introduces new knowledge competencies that should be obtained by the design integration manager prior to pursuing a design-build project in the federal sector. Specifically, this knowledge includes the following:

- **Applicable policies and/or design guide manuals.** The design integration manager should have knowledge of requirements applicable to the project at hand, such as the those required by the General Services Administration (GSA) Facilities Standards for the Public Building Service (P-100) or by the US Army Corps of Engineers (USACE) Unified Facilities Criteria (UFC).
- **Compliance and auditing procedures.** Federal projects often involve complex cost accounting standards to ensure consistency and accuracy in cost estimation, allocation, and reporting. Knowledge of FAR compliance and auditing procedures is crucial to ensure that financial transactions are transparent and accountable throughout the project.
- **Dispute resolution and claim procedures.** Familiarity with the FAR's procedures for filing claims and handling disputes, including the Contract Disputes Act, is important for resolving conflicts that arise in accordance with federal guidelines.
- **Subcontracting requirements.** Federal projects often require a certain percentage of the design and construction scope to be performed by small business enterprises (SBEs), minority-owned business enterprises (MBEs), and/or women-owned business enterprises (WBEs). These requirements are negotiated by each federal agency with the Small Business Administration on an annual basis. The design integration manager should have knowledge of these requirements as well as the reporting procedures that demonstrate that the requirements are met.
- **International trade requirements.** Design integration managers should be familiar with the FAR's rules and regulations related to trade agreements, compliance with the "Buy America" acts, and export controls, especially during the proposal phase.

## Key Recommended Skills in the Federal Sector

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Leading a project team

Managing and tracking project costs

Organizing information and record keeping



Managing security protocols



Managing document security

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Of the recommended skills documented in *The Design-Builder's Guide to Design Management*, the following are key in the federal sector:

- Leading a project team
- Managing and tracking project costs
- Organizing information and record keeping



When navigating federal projects, design integration managers are largely expected to have the same skills as those outlined in *The Design-Builder's Guide to Design Management*. However, because of the security concerns common in the federal sector, the following additional skills may be useful:

- **Managing security protocols.** To ensure compliance with government security protocols, the design integration manager may need to manage security processes for personnel who require access to classified information or secure facilities (e.g., obtaining nondisclosure agreements [NDAs] and confirming the “right to know” of appropriate personnel).
- **Managing document security.** The design integration manager must understand and adhere to federal cybersecurity requirements and client specifications and, in this context, manage design coordination across various platforms, potentially including cloud-based systems.

## Key Recommended Abilities in the Federal Sector

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Collaborating with partners

Working well under time pressure

While all of the abilities documented in *The Design-Builder's Guide to Design Management* are applicable to federal projects, two stand out as being especially important:

- Collaborating with partners
- Working well under time pressure

## Key Recommended Other Characteristics in the Federal Sector

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Accountable

Self-motivated

Adaptable

Patient

Of the recommended other characteristics documented in *The Design-Builder's Guide to Design Management*, the following are key in the federal sector:

- Accountable
- Self-motivated
- Adaptable
- Patient



# CHAPTER 4: PROPOSAL/PRE-AWARD PHASE



## Description of Phase

For federal design-build projects, the proposal/pre-award phase has several unique features. This phase begins when a government agency releases a request for qualifications (RFQ) and/or a request for proposal (RFP). The proposal/pre-award phase can be organized as a one-step or two-step process. When the proposal/pre-award phase follows a one-step process, the task sequence is similar to that presented in *The Design-Builder's Guide to Design Management*. However, federal design-build projects often follow a two-step process involving two distinct phases: the Request for Qualifications Phase and the Request for Proposal Phase.

In the RFQ phase, the emphasis is on the qualifications, experience, and capabilities of the potential design-build teams. The federal agency uses the RFQ to shortlist the most suitable candidates to move forward in the selection process. This phase typically does not involve detailed design work but instead focuses on demonstrating the teams' competence and capacity to handle the project. Teams may also provide examples of similar completed projects and a history of collaboration between the design partners and the design-builder.

Following the RFQ phase, the shortlisted teams are invited to participate in the RFP phase. In this phase, the federal agency provides a detailed project scope and requirements. Additionally, the design-build teams will often need to understand and reconcile bridging documents, which may be prepared at a high level of detail. Bridging documents can limit the creativity and freedom of the early technical concept but need to be understood to avoid later complications in the early design phase. (See [Chapter 6](#) for a more detailed discussion of these challenges.) The design-build teams are then tasked with developing a comprehensive proposal that outlines their solutions, designs, and cost estimates for the project. This phase, in contrast to the RFQ phase, thus emphasizes design and project planning. The federal agency evaluates the proposals to select the winning team that will proceed to the contract award phase.

The design integration manager needs to exercise care when developing or assembling cost estimates during the RFP. Many federal projects include separate contract line item numbers (CLINs) for preconstruction and construction costs in their awarded contracts, as noted in the Federal Acquisition Regulation (FAR) Section 204.71. It is important that the design-builder account for all costs related to preparation and management of the design in the preconstruction CLIN. Most agencies will not allow billings against the construction CLIN until Issued for Construction (IFC) documents are issued and construction can commence.

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*Federal design-build projects often follow a two-step process involving two distinct phases: the Request for Qualifications Phase and the Request for Proposal Phase.*

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Money cannot be moved between CLINs after the contract has been awarded, so if the preconstruction CLIN is missing costs, the design-builder (and by extension the design team) may find itself in a precarious position in terms of cash flow.

Overall, the two-step RFQ/RFP process allows federal agencies to first identify the most qualified teams and then obtain detailed project proposals from those teams, ensuring that the selected design-build team is best suited to meet the specific requirements of the project.

There are some notable differences between federal and non-federal projects regarding the two-step procurement process:

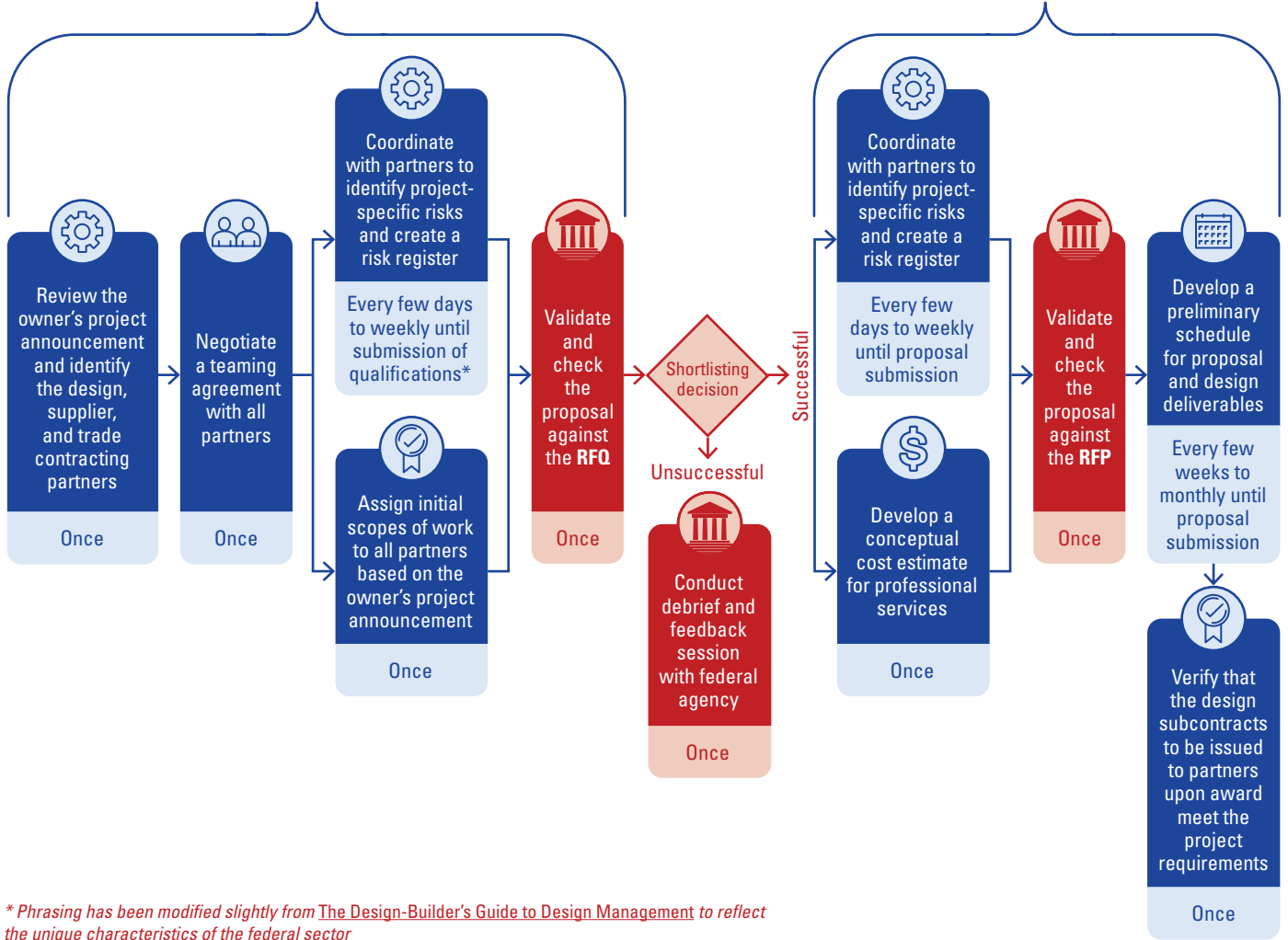
1. The RFP/RFQ documents for federal projects are often quite long. They can sometimes stretch to a thousand pages of intricate and comprehensive requirements, indicating the sheer complexity of these projects. Moreover, additional documents and regulations (e.g., the FAR or the “Buy America” acts) are only referenced in the RFQ/RFP documents but nonetheless remain the responsibility of the design integration manager to read and understand.
2. There is a set duration of time between the issuance of the RFP and the proposal due date. This period can be as short as 30 days but is typically between 45 and 60 days. This means that the design integration manager often does not have enough time to institute all of the tools and best practices identified in *The Design-Builder’s Guide to Design Management*.
3. The composition of federal design-build teams might require the integration of specialists who have preferred service agreements to provide specialties such as security and surveillance. These preferred service providers often bring in-depth knowledge of federal project requirements, which can be helpful to the design integration manager.
4. The duration of federal proposals is typically longer than that of private sector proposals. The federal proposal/pre-award phase may extend anywhere from a couple of months to as long as nine months, and the preparation of proposals can be particularly demanding. Teams must demonstrate an acute understanding of federal regulations, the ability to address highly specific project demands, and a commitment to cost estimation that withstands scrutiny. It is in this environment that the proposal/pre-award phase sets the stage for rigorous assessment, coordination, and alignment with federal agencies’ unique expectations before contract award.

## **The Role of the Design Integration Manager**

The tasks of the design integration manager during the proposal/pre-award phase largely align with those in *The Design-Builder’s Guide to Design Management*, apart from the removal of one task and the addition of two new tasks.

**Step 1: Request for Qualifications Phase**

**Step 2: Request for Proposal Phase**



\* Phrasing has been modified slightly from [The Design-Builder's Guide to Design Management](#) to reflect the unique characteristics of the federal sector

Workflow of the design integration manager's tasks during the proposal/pre-award phase

## Additional Task: Validate and Check the Proposal against the RFQ/RFP

### Once (per RFQ/RFP phase)

In this task, the design integration manager comprehensively evaluates the RFQ or RFP documents issued by the federal agency. This examination encompasses understanding the technical specifications, project scope, and specific design expectations set forth in the initial RFQ/RFP.

Knowledge	Skills	Abilities	Other Characteristics
<ul style="list-style-type: none"><li>• Project roles and the work commonly associated with each role</li><li>• Contractual terms and conditions, including federal regulations</li></ul>	<ul style="list-style-type: none"><li>• Listening</li><li>• Determining client and stakeholder expectations</li><li>• Organizing and leading effective meetings</li></ul>	<ul style="list-style-type: none"><li>• Engaging in continuous learning</li><li>• Establishing and maintaining relationships</li><li>• Collecting, analyzing, and interpreting information</li></ul>	<ul style="list-style-type: none"><li>• Respectful</li><li>• Timely</li><li>• Accountable</li></ul>

The main goal of this task is to ensure that the proposal documents are compliant with applicable regulations prior to submission. Federal projects involve strict rules and specific guidelines, and the design integration manager is a key player in ensuring that the project proposal meets every meticulous requirement laid out in the RFQ or RFP documents. During the RFQ/RFP phases, the design integration manager should avoid presenting any concepts to the project stakeholders or contracting officer that have not been vetted by the rest of the design-build team.

During the RFQ phase, the design integration manager should match the availability of key personnel with the proposed project timeline. Because key personnel are often a consideration factor in best-value selection, substitution of key personnel after the contract has been awarded is extremely difficult with most agencies. Many agencies require substitution of personnel with equivalent or better qualifications, which can be difficult to achieve.

### RFQ Checklist

Although each RFQ might be slightly different, some common items will typically need to be checked:

- **Adherence to submission instructions.** Verify that the statement of qualifications follows the format, structure, and submission process detailed in the RFQ.
- **Eligibility requirements.** Confirm that the statement of qualifications explains how the organization meets all of the eligibility criteria, such as years of experience, financial stability, and any specific qualifications required.
- **Scope of work.** Ensure that the statement of qualifications addresses all aspects of the scope of work outlined in the RFQ.
- **Project team qualifications.** Include the resumes and qualifications of key personnel who will work on the project, ensuring that this information matches the requirements in the RFQ. The design integration manager should understand the availability of these key personnel in relation to the proposed project timeline.
- **Insurance and bonds.** Ensure that insurance and bonding requirements are acknowledged and will be met.

During the RFP phase, the design integration manager helps prevent any discrepancies or misalignments in the scope of work that could arise during project execution. Once the design-build team is shortlisted, the design integration manager is encouraged to engage with the owner's stakeholders.

To obtain important feedback from these stakeholders, the Design-Build Institute of America (DBIA) recommends in *Federal Sector Design-Build Done Right: Best Design-Build Practices* that government agencies “should conduct confidential meetings with shortlisted proposers prior to the submission of technical and price proposals, particularly on high-value projects, as this encourages the open and candid exchange of concepts, concerns, and ideas.” (The publication cites FAR Section 15.201 and a Policy Letter from the US Office of Management and Budget, Office of Federal Procurement Policy, dated February 2, 2011, titled “Myth Busting”: Addressing Misconceptions to Improve Communication with Industry during the Acquisition Process). However, this remains at the discretion of the contracting officer. When combined with a rigorous validation process, this process ensures that the proposal not only complies with the federal agency’s demands but also accurately reflects the project’s unique specifications and design elements.

## RFP Checklist

Although each RFP might be slightly different, some common items will typically need to be checked:

- **Adherence to submission instructions.** Verify that the proposal follows the format, structure, and submission process detailed in the RFP.
- **Executive summary.** Craft an executive summary that encapsulates the key points of the proposal and aligns them with the RFP’s objectives.
- **Technical proposal.** Address all technical specifications, methodologies, and approaches requested, demonstrating an understanding of the project requirements.
- **Management plan.** Include a detailed plan outlining project management, team structure, and communication methods.
- **Project team qualifications.** Summarize the qualifications of the project team, typically expanding on information provided during the RFQ stage and likely including a defined and detailed organizational chart of the people and companies involved in the project.
- **Pricing.** Submit a detailed pricing proposal that is in alignment with the RFP’s instructions, ensuring that all costs are accounted for and justified.
- **Schedule and timelines.** Present a realistic project schedule, including a design packaging plan that aligns with the RFP’s expected milestones and construction completion dates.
- **Risk management plan.** Identify potential risks and provide detailed mitigation strategies that demonstrate proactive risk management.
- **Compliance with legal and regulatory requirements.** Confirm that the proposal meets all legal, regulatory, and compliance requirements stipulated in the RFP.
- **Subcontractor details.** If subcontractors have already been identified, include their qualifications and relevant information, particularly if the RFP outlines specific subcontracting requirements such as a subcontracting plan for small business.
- **Diversity and inclusion.** If required, address how the proposal complies with any goals related to diversity or the participation of small businesses or minority-, woman-, or veteran-owned businesses.
- **Environmental and sustainability practices.** If applicable, describe the organization’s sustainability practices and compliance with environmental regulations.
- **Compliance with the “Buy America” acts.** Ensure that the proposal procurement strategy complies with [acts regarding the use of American-made products or American labor](#).
- **Comparison to the bridging documents.** If applicable, explain how the contents of the proposal achieve or modify the intentions of the bridging documents.
- **Amendments.** Acknowledge any amendments that may have been issued during the solicitation and ensure that they are reflected in the final proposal.

## Additional Task: Conduct Debrief and Feedback Session with Federal Agency

### Once

In this task, the design integration manager requests and participates in an official debriefing session with the federal agency following the RFQ/RFP process. When available, this session provides an opportunity for the design-builder to learn about the strengths and weaknesses of the proposal as well as the agency's evaluation process and other information that may help to improve the design-builder's chances of winning future projects.

Knowledge	Skills	Abilities	Other Characteristics
<ul style="list-style-type: none"> <li>Contractual terms and conditions</li> </ul>	<ul style="list-style-type: none"> <li>Organizing information and record keeping</li> </ul>	<ul style="list-style-type: none"> <li>Focusing on and remembering details</li> <li>Collecting, analyzing, and interpreting information</li> </ul>	<ul style="list-style-type: none"> <li>Focused</li> <li>Accountable</li> </ul>

Responding to an RFQ and/or RFP requires a considerable time investment, and learning from each experience, win or lose, is important to the design-builder's long-term success. Specifically, participating in a debriefing session allows the design-builder to "peek behind the curtain" of proposal evaluations and gain valuable information to build from in future proposals. Debriefing sessions are available upon request for any competitive procurement with a federal agency. The design-builder may request a debriefing from the federal agency at two points in the process:

1. Pre-award, after being excluded from further competition following an unsuccessful RFQ response (see FAR Section 15.505)
2. Post-award, either after an unsuccessful proposal and where a pre-award briefing was not previously requested, or after a successful proposal (see FAR Section 15.506)

The timing of these requests is highly sensitive. Generally, the design-builder will have only three calendar days following notice of unsuccessful competition or following receipt of a notice of contract award to submit a written request for a debriefing. Requests received later than three days may be granted at the discretion of the contracting officer but are not guaranteed. Once a request is accepted, the debriefing typically occurs within five days.

The debriefing may be provided either in writing or in the form of a call, video conference, or in-person meeting with a representative of the federal agency. It is best to be prepared. Consider who from the design-build team should attend in advance and prioritize questions to ask during and after the debriefing. In the debriefing, the federal agency can provide certain valuable feedback on the design-builder's RFQ and/or RFP response. This feedback can include the following:

- The agency's evaluation of significant elements in the proposal, including weaknesses or deficiencies, if applicable
- A summary of the rationale for eliminating the proposal from competition (if unsuccessful) or the rationale for the award (if successful)
- The overall ranking of the design-builder among all competitors, if a ranking was developed by the agency during the selection process
- The overall evaluated price and technical rating of the successful proposal compared to those of the proposal submitted by the design-builder being debriefed
- Reasonable responses to relevant questions about whether the selection procedures described in the RFQ/RFP, applicable regulations, and other applicable authorities were followed in review of the proposal



However, the federal agency *will not* share certain information during the debriefing session:

- Number of competitors
- Identity of other competitors
- Content of other competitors' proposals
- Evaluations of other competitors
- Point-by-point comparisons of the debriefed design-builder's proposal with other competitors' proposals
- Any information prohibited from disclosure, such as trade secrets and proprietary or confidential processes or techniques

While some of the feedback may be uncomfortable to hear, the debriefing should be viewed as a constructive experience. Learning from both successful and unsuccessful proposals can support the design-builder's continuous improvement and strengthen relationships with the federal agency.



# CHAPTER 5: POST-AWARD PHASE



## Description of Phase

For federal projects, the post-award phase is an important time to align the project with client expectations and establish clear communication regarding financial and contractual matters. However, federal projects often have a unique challenge during this phase, in that not all federal projects follow a predictable timeline. The post-award phase can come after a notable lag period between the submission of the proposal and the selection of the design-builder or sometimes between the selection of the design-builder and the contract award. This lag often lasts for months and can even extend to over a year.

The critical importance of this phase is often overlooked; it is not just a waiting period but a time to establish communication protocols, recalculate the owner's ask and/or the design-build team's offer, and perform other critical activities. During any time lag, the project team engages in these activities to prepare for contract execution. This phase requires flexibility and adaptability to ensure that all necessary pre-design tasks are completed before entering the design phases.

## The Role of the Design Integration Manager

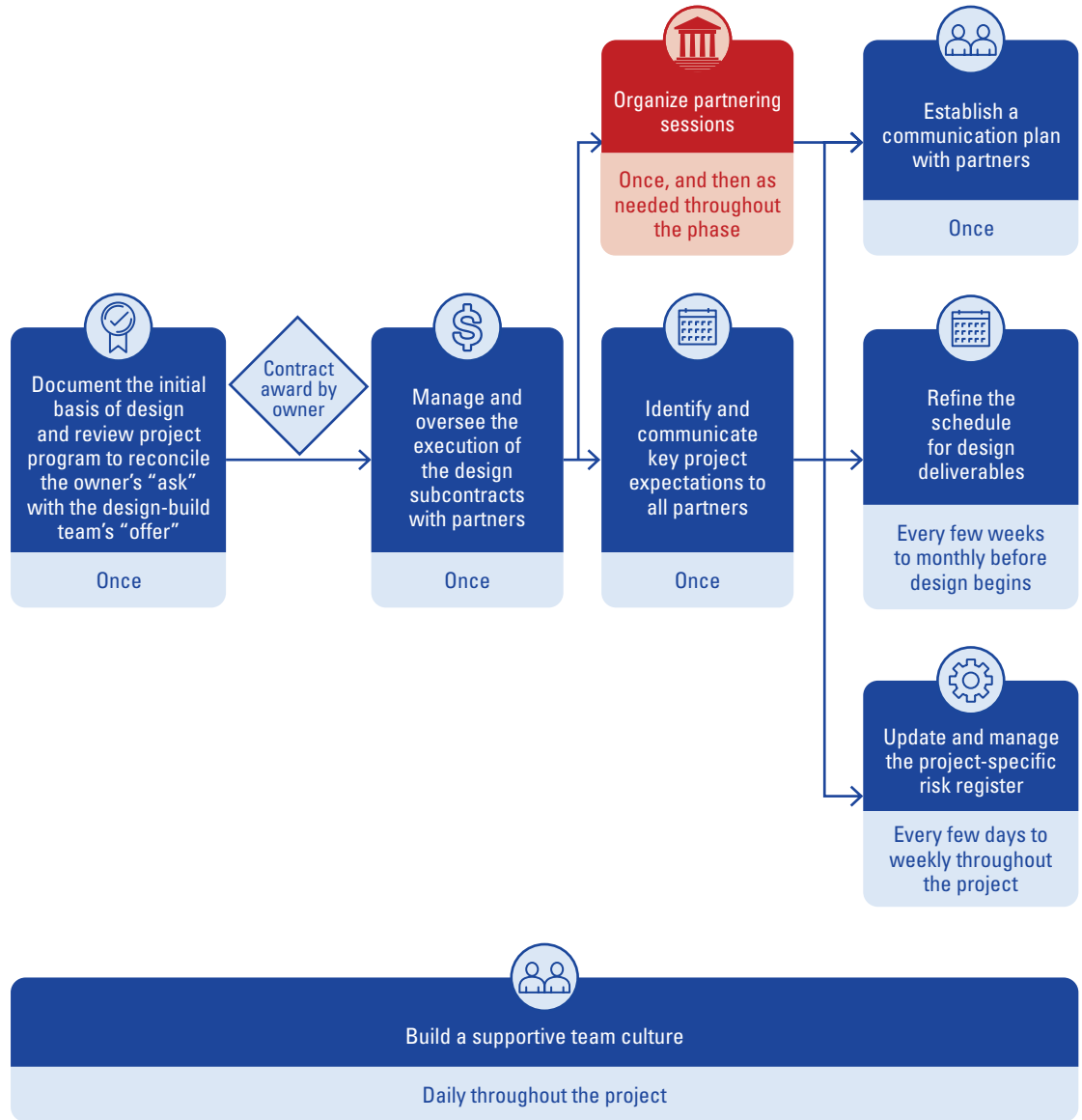
The time lag frequently encountered on federal projects often leads to the need for a handoff between the design integration manager involved with the proposal and a new design-build manager that will participate in the remainder of the project. In the words of one subject matter expert, “we are not going to keep a good design integration manager on the bench for six to nine months” while waiting for the contract to be awarded. Should a handover be required, the design integration manager involved in the proposal should take special care to document the rationale and important points and then hold a series of handover meetings with the new design integration manager to minimize knowledge loss. However, some contracts contain clauses that state that a named or assigned person cannot be removed unless a letter is written and approved by the contracting officer, so teams should be careful to check project-specific requirements on this matter.

The tasks of the design integration manager during the post-award phase align with those in *The Design-Builder's Guide to Design Management*, apart from the addition of one new task.



*For federal projects, the post-award phase is an important time to align the project with client expectations and establish clear communication regarding financial and contractual matters.*





*Workflow of the design integration manager's tasks during the post-award phase*

## Additional Task: Organize Partnering Sessions

### Once, and then as needed throughout the phase

In this task, the design integration manager identifies a consultant who will facilitate partnering sessions to build a collaborative team dynamic while ensuring alignment with federal regulations and transparent communication among diverse stakeholders.

Knowledge	Skills	Abilities	Other Characteristics
<ul style="list-style-type: none"> <li>Project roles and the work responsibilities commonly associated with each role</li> <li>Contractual terms and conditions</li> <li>Compliance and auditing procedures</li> <li>Subcontracting requirements</li> </ul>	<ul style="list-style-type: none"> <li>Conveying a message in written form</li> <li>Negotiating with partners and stakeholders</li> <li>Leading a project team</li> <li>Motivating people to a desired outcome</li> <li>Organizing and leading effective meetings</li> <li>Compromising and finding equitable solutions</li> </ul>	<ul style="list-style-type: none"> <li>Collaborating with partners</li> <li>Establishing and maintaining relationships</li> <li>Speaking comfortably in a group situation</li> </ul>	<ul style="list-style-type: none"> <li>Trustworthy</li> <li>Empathetic</li> <li>Patient</li> <li>Adaptable</li> </ul>

Partnering sessions during the post-award phase play a more important role in federal projects than in non-federal projects. Partnering sessions involve confirming the vision, mission, and purpose for the project team that were established during the proposal. These sessions are aimed at building a collaborative and communicative culture among stakeholders and are considered a critical aspect of this phase. Many federal agencies now require partnering on their projects and are developing standardized processes for partnering, such as those described in the [US Army Corps of Engineers Construction Project Partnering Playbook](#).

Expectations regarding federal-specific regulations should be communicated to project team members. For instance, federal employees are subject to extensive ethics rules that include limitations on accepting gifts or participating in certain activities, such as expensive dinners or golf outings. During the post-award phase, it is essential to ensure that all project team members understand and adhere to these federal regulations and that opportunities are identified for social interactions and team building at an appropriate price level.

During the partnering sessions, the design integration manager needs to consider document security measures that will be taken throughout the project. Design coordination can occur across various platforms, potentially including cloud-based systems. Understanding and adhering to federal cybersecurity requirements and client specifications are essential aspects of the design integration manager's responsibilities. During the post-award phase, careful consideration should be given to distinguishing between sensitive and classified documents and defining proper handling and disposal procedures, especially for derivative works produced by the design-builder. It is important to note that software systems like Bluebeam that are not compliant with the Federal Information Security Management Act (FISMA) should be avoided.

Additionally, collaboration with the client is necessary to determine how derivative works, such as design deliverables, need to be marked and classified. This consideration extends to various documents, such as shop drawings and calculations produced during the design process. These discussions during the post-award phase contribute to the development of comprehensive guidelines for document handling throughout the project.

Special attention should be paid to team building in order to establish a strong team dynamic. Federal design-build projects involve collaboration among diverse team members who may be working together for the first time and will continue to work together for an extended duration. These team members quickly need to learn to work together to deal with regulations, compliance requirements, and the high level of transparency expected on federal projects.

Design integration managers on federal projects must be especially diligent about adhering to these regulations, ensuring that all actions are compliant with legal and regulatory requirements, and maintaining transparency in decision-making processes. Patience is essential for allowing team members the time they need to express their ideas, concerns, and feedback fully and for the design integration manager to manage conflicts calmly and ensure that all voices are heard. The partnering sessions are an opportunity to develop a conflict resolution map during the post-award phase that emphasizes that the project team should focus on resolving conflicts at the team level rather than escalating issues to higher executives. This approach is designed to promote effective conflict resolution within the project team.

## Partnering Sessions

Who should attend the partnering sessions?

The RFP will dictate the specific attendees, but the following parties should likely attend:

- Project manager
- Design integration manager
- Federal agency representatives
- Key project team members (designers, trades)
- Compliance and regulatory specialists
- Contracting officer
- End users of the space
- Other relevant authorities, such as utilities, municipalities, local authorities having jurisdiction (AHJs), etc.

What is the purpose of the partnering sessions?

- Establish a shared vision, mission, and purpose
- Develop a collaborative culture in line with federal regulations
- Create conflict resolution strategies tailored to the project environment

What do you do in the partnering sessions?

- Conduct team building exercises to break down barriers and increase trust
- Collaborate to agree upon a shared vision and goals for the project
- Outline roles and responsibilities concerning the project and concerning compliance with federal legal and regulatory requirements
- Establish communication protocols, including frequency of meetings, points of contact, and preferred communication channels
- Formulate a conflict resolution map to handle disputes internally and proactively
- Set up key performance indicators (KPIs) for project milestones, and determine benchmarks for quality, safety, and other critical aspects

What are some suggested best practices for successful partnering sessions?

- Ensure regular, transparent communication for clarity on federal regulations.
- Encourage patience and open dialogue for comprehensive sharing of ideas and concerns.
- Conduct partnering sessions early in the post-award phase and throughout the project to set the tone for collaboration.
- Document all agreements and strategies developed during the partnering sessions.
- Create a partnering charter that summarizes the agreements made during the partnering sessions, which is then signed by all key parties. This charter can be revisited and/or adjusted as necessary; partnering is a continuous process throughout the project.

What is the outcome of the partnering sessions?

- A unified team ready to tackle project challenges with a clear understanding of federal guidelines and a robust strategy for conflict resolution

The above is intended as a short overview of partnering. For more detailed guidance, several helpful resources are available that include partnering guides for federal projects. One publicly available resource is the [US Army Corps of Engineers \*Construction Project Partnering Playbook\*](#), which was developed in collaboration with industry.





# CHAPTER 6: EARLY DESIGN PHASE



## Description of Phase

In the early design phase of federal design-build projects, a distinctive aspect is the various parties that must be engaged. Foremost, engagement is needed with the owner and end user stakeholders themselves because federal agencies all manage construction on behalf of various client agencies. Additional parties that must be engaged can include a facilities management group, authorities having jurisdiction (AHJ), subject matter experts (SMEs), and/or other parties who become involved after the contract has been awarded and who may be involved in the design reviews. Special attention needs to be given to these parties in federal projects because they play a pivotal role in ensuring that the project aligns with the stringent federal regulations, codes, and safety standards. The identity and scope of the AHJs and SMEs can vary significantly depending on the federal agency overseeing the project. Federal agencies often rely on fire protection engineers; structural experts; heating, ventilation, and air conditioning (HVAC) specialists; and energy efficiency professionals as SMEs. These experts hold the authority to approve critical project components, such as certificates of occupancy, making their early involvement paramount to the smooth progression of the project. For this reason, a design kickoff meeting or initial design conference with all parties is critical.

Engaging with the various parties involved in a federal project extends beyond merely identifying them; it also involves understanding their preferences, communication styles, and the specific nuances of their expertise. Some AHJs may prefer minimal interaction until project completion, while others may advocate for continuous engagement throughout the design process. This underscores the complexity of managing multiple parties with diverse expectations and emphasizes the need for a skilled design integration manager capable of navigating these intricacies.

The design integration manager must also give attention to mediating design questions between the project design team and the owner. During the early design phase of federal design-build projects, design questions are especially likely to arise when the design team begins navigating any bridging documents provided with the request for proposal (RFP). These documents often serve as a starting point during the proposal/pre-award phase but can introduce complexities that demand careful consideration. One of these complexities is the unpacking and reconciliation of the bridging documents, which involves a meticulous review to align them with project goals. This process can reveal discrepancies or unanticipated requirements.

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*In the early design phase of federal design-build projects, a distinctive aspect is the various parties that must be engaged.*

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During the early design phase, for instance, it may be discovered that certain aspects of the bridging documents do not align with the intent of the RFP. These discrepancies must be addressed, but it is crucial to approach this task with sensitivity to the fine line between necessary adjustments and extensive redesign. The design integration manager must strike the right balance and ensure that the project maintains compliance with legal and regulatory requirements while minimizing scope changes. Overall, dealing with bridging documents in federal design-build projects requires an approach that can harmonize initial expectations with the practical realities of project execution.

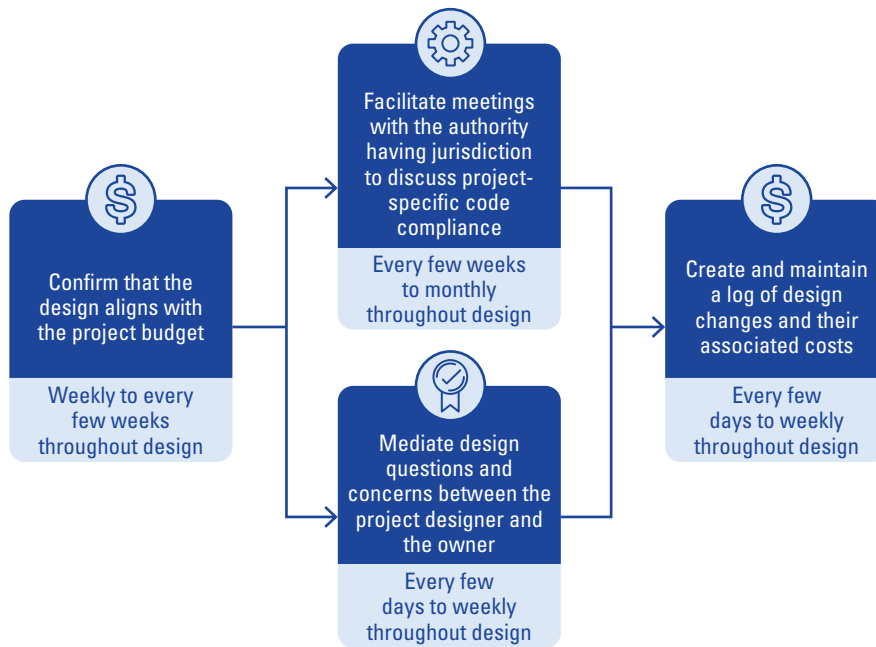
During the early design phase, a nuanced approach to interpreting the Federal Acquisition Regulation (FAR) is required, one that recognizes both its permissibility and the agency's existing practices. The relationship between the design integration manager and the contracting officer is key in this regard. During the early design phase, the design-build team should maintain open communication with the contracting officer to align their respective interpretations and expectations, ensuring that project planning and execution are compliant with the FAR while addressing the specific project's needs.

To help design integration managers navigate this complex landscape and ensure compliance with legal and regulatory requirements, it is highly beneficial to refer to the Design-Build Institute of America's (DBIA's) *Federal Sector Design-Build Done Right: Best Design-Build Practices*. This resource provides valuable insights and citations to specific FAR clauses that pertain to various aspects of project management and execution.

Overall, the early design phase of federal design-build projects stands out due to its intricate web of experts and stakeholders (each with specific requirements and expectations) and the need for reconciliation with any bridging documents. Effectively managing the engagement of various parties is not only essential for compliance but also critical for a project's success and timely delivery.

## **The Role of the Design Integration Manager**

The tasks of the design integration manager during the early design phase align with those in *The Design-Builder's Guide to Design Management*.




 Set goals for meetings, then plan and organize effective meetings  
 Every few days to weekly throughout design


 Oversee the progress of the design schedule  
 Weekly to every few weeks throughout design

*Workflow of the design integration manager's tasks during the early design phase*



# CHAPTER 7: DETAILED DESIGN PHASE



## Description of Phase

Federal projects do not require specific additional tasks for the design integration manager during the detailed design phase. However, federal projects require a higher level of ongoing oversight and coordination than projects in the private sector. Specifically, the design integration manager needs to provide additional oversight in two areas: (1) conducting design and constructability reviews and (2) handling exceptions between the proposal and the final design.

## The Role of the Design Integration Manager

First, the task of **design review management** requires special attention from the design integration manager. Unlike projects in other sectors, federal design-build projects demand adherence to the request for proposal (RFP) and specific project objectives at each stage. The design integration manager's role is to ensure that any comments and clarifications provided by the federal agency align with these objectives and ultimately that the detailed design aligns with the RFP.

Furthermore, design review management in federal projects requires the design integration manager to be highly responsive and adept at addressing comments and clarifications promptly. In contrast to some private sector projects, where the review process might be less rigorous, federal projects involve a much more detailed process for managing the reviews and the responses, with multiple people looking at the set of drawings at different submittal phases. The design integration manager, for instance, coordinates and manages design reviews by subject matter experts (SMEs), which often involve multiple people from different regions or agencies. Furthermore, project owners might need to be educated about the distinctive nature of the design-build process. The design integration manager plays an integral part in setting clear expectations, guiding stakeholders and other parties on the level of documentation that they will encounter during design reviews, and avoiding the inefficiencies of irrelevant or premature inquiries.

The design integration manager's responsibilities extend beyond merely facilitating reviews; they involve managing the expectations of owners and other stakeholders and ensuring that design adjustments align with the project's schedule and budget. Federal agencies are stringent in their oversight, and, as such, the design integration manager must navigate an environment where transparency, accountability, and compliance with the RFP are paramount. The design integration manager's role in this regard is to ensure that reviews focus on aspects of the design relevant to the project's scope and objectives. By doing so, the design integration manager prevents unnecessary delays and keeps the design-build process running smoothly.

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*During the detailed design phase of federal projects, the design integration manager needs to provide additional oversight in two areas: (1) conducting design and constructability reviews and (2) handling exceptions between the proposal and the final design.*

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Second, the design integration manager's oversight extends to handling exceptions and **documenting the final basis for design**. The design integration manager must track any issues or discrepancies that may arise during the detailed design phase and act as a central point of contact between the project team and the contracting officer, addressing concerns promptly and efficiently.

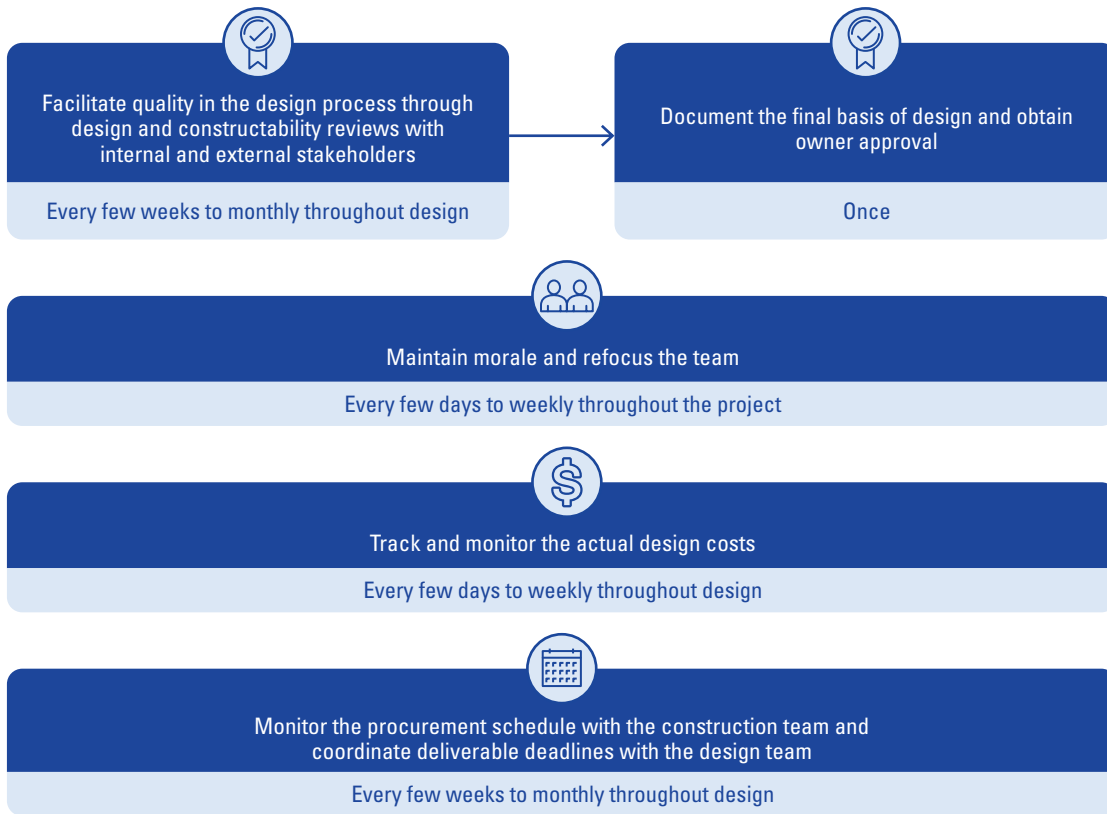
One key aspect of exception handling involves addressing deviations from the original RFP. It is not uncommon for deviations to occur due to unforeseen circumstances or evolving project requirements. For instance, the design integration manager may encounter situations where specific materials or design elements need to deviate from what was initially outlined in the RFP. In such cases, the design integration manager collaborates with the project team to present a compelling case for these deviations, highlighting the benefits of and reasons for the proposed changes. This may involve discussions with and/or the submission of change orders to the federal agency or owner to obtain approval for the exceptions.

Additionally, the design integration manager's role in exception handling extends to the review and approval process for the design. The design integration manager ensures that exceptions are properly documented and communicated to all relevant parties, such as contracting officers and SMEs. Clear communication and documentation during design reviews are essential to demonstrating that the proposed exceptions are reasonable and in the best interest of the project.

One common best practice for handling exceptions is to utilize a matrix or compliance log to track all changes to the RFP that are approved throughout the design process. These changes can be numerous in federal design-build projects, particularly those with thousands of pages of sometimes conflicting requirements and/or bridging documents. At the completion of the design-build project, another best practice is to work with the owner to produce a redlined RFP that incorporates all changes throughout the design process. If issues arise as the end users begin to use the facility, the final design is compared against the RFP requirements that formed the basis of the contract. Even if the design-builder obtained approval for a given deviation from the RFP, without a redlined RFP there is no contractual documentation that the requirement was changed.

In addition, the design integration manager's ongoing oversight and coordination during the detailed design phase involves monitoring design costs and procurement schedules. The design integration manager serves as a critical link between the project team and stakeholders, fostering effective communication and alignment with the project's goals and objectives.

Apart from the increased oversight required during the detailed design phase, the tasks of the design integration manager in this phase align with those in *The Design-Builder's Guide to Design Management*.



*Workflow of the design integration manager's tasks during the detailed design phase*





# CHAPTER 8: CONSTRUCTION PHASE



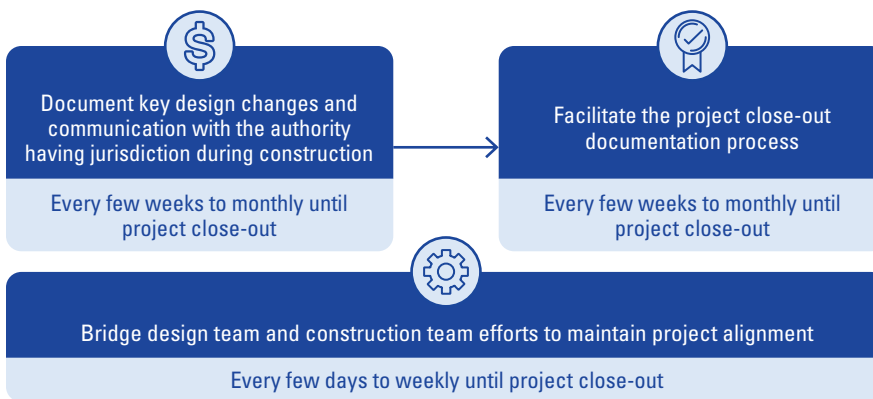
## Description of Phase

From the perspective of the design integration manager, the construction phase of federal projects typically mirrors that of non-federal projects. While some specific federal regulations and documentation requirements may need to be followed, the core principles of managing the construction project, such as planning, scheduling, budgeting, quality control, and stakeholder coordination, remain consistent. The same is true for project close-out, where tasks such as final inspections, documentation review, financial reconciliation, and stakeholder communication similarly remain consistent. This alignment ensures that federal projects can effectively conclude with a focus on accountability, quality assurance, and the successful handover of deliverables.

## The Role of the Design Integration Manager

One thing for the design integration manager to keep in mind is that, in contrast to non-federal owners, federal owners are also commonly long-term asset managers of the facility. Some additional work may be involved if federal owners require help integrating the final documentation into existing legacy asset management systems. As with any project, the design integration manager needs to assist with the coordination and handover of the final design documentation.

The tasks of the design integration manager during the construction phase align with those in *The Design-Builder's Guide to Design Management*.



*Workflow of the design integration manager's tasks during the construction phase*

“

*From the perspective of the design integration manager, the construction phase of federal projects typically mirrors that of non-federal projects.*

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# GLOSSARY



## B

### **Bridging Documents**

Detailed project requirements, performance criteria, specifications, and sometimes conceptual design work developed before a design-builder is hired. These documents attempt to provide a higher level of project definition and detail up front than that provided in an RFP.

### **Buy American Act**

A 1933 federal law that gives preference to domestically produced goods and materials in federal procurement, impacting sourcing options and costs on federal projects.

### **Buy America Act**

A 1982 federal law that requires the purchase of locally sourced iron, steel or other manufactured products for federally funded transportation projects like the construction of roads and bridges.

### **Build America, Buy America Act**

Enacted as part of the Infrastructure Investment and Jobs Act on November 15, 2021, federal legislation that establishes a domestic content procurement preference for all federal financial assistance obligated for infrastructure projects after 2022. The domestic content procurement preference requires that all iron, steel, manufactured products, and construction materials used in infrastructure projects covered by the legislation are produced in the United States.

## C

### **Compliance**

Adherence to specific rules, regulations, and standards, especially those outlined in the Federal Acquisition Regulation (FAR), governing federal projects to ensure conformity with legal and contractual obligations.

### **Continuing Resolution**

A temporary funding measure used by the federal government to fund its agencies and programs when Congress has not passed a budget by the start of the fiscal year.

### **Contract Line Item Number (CLIN)**

A unique identifier assigned to a specific item or service listed within a contract. Each CLIN can represent a deliverable or an element of a cost such as labor hours worked, quantity of a product, or funding for travel. CLINs are used by federal agencies to facilitate contract administration, accounting, and deliverable tracking.

### **Contracting Officer**

An individual appointed by the federal agency initiating the project who has the authority to enter, administer, or terminate contracts on behalf of the federal government. Contracting officers are responsible for ensuring compliance with contract terms and safeguarding the interests of the United States.

## D

### **Davis-Bacon Act**

Federal legislation that requires the payment of prevailing wages and fringe benefits to laborers and mechanics on federally funded construction projects.

### **Debriefing**

A meeting with a representative of a federal agency requested by a design-builder, typically one that has been eliminated from the RFQ or RFP competition, either prior to or after contract award. A debriefing may also be provided to successful awardees upon request. The debriefing provides the design-builder with an opportunity to learn from the agency why the design-builder did or did not receive a contract award or why the design-builder was eliminated from competition. The debriefing maybe be provided in writing or in the form of a call, video conference, or in-person meeting at the discretion of the federal agency.

## F

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### Federal Acquisition Regulation (FAR)

A set of rules and regulations that govern the acquisition process for all federal agencies in the United States. The FAR defines the procedures and requirements for federal procurement, including design-build projects. It is important to note that all federal agencies have a supplement to the FAR that is equally binding within that agency (e.g., the Department of Defense has the DFAR, the Department of Veterans Affairs has the VFAR, and so on).

## I

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### Interagency Coordination

The process of collaboration and alignment of efforts among multiple government agencies or departments involved in federal projects.

## N

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### National Environmental Policy Act (NEPA)

A federal law that requires federal agencies to assess and consider the environmental impacts of their proposed actions, including construction projects, before making decisions.

## P

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### Prevailing Wages

The hourly wage rates and fringe benefits paid to workers employed in a specific occupation within a specific geographic area, as determined by government authorities. The Davis-Bacon Act requires that workers on federally funded construction projects be paid no less than the prevailing wage to discourage the use of non-local, low-cost labor to undercut the competitiveness of local labor. This requirement can lead to higher labor costs on federal projects than on private sector projects.

## Procurement Guidelines

Rules and procedures governing the acquisition of goods and services by federal agencies, including guidelines related to the interaction between design-build teams and contracting officers.

## Public Sector Client

A government agency or entity in the public sector responsible for initiating, funding, and overseeing construction or design-build projects for public interest and community benefit.

## T

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### Two-Step RFQ/RFP Process

A process often followed in federal design-build projects that entails evaluation of the design-build team's qualifications in the RFQ phase and detailed proposals in the RFP phase. This is also known as two-step best-value selection (FAR Subpart 36.3).



**Sitting at the intersection of multiple parties in a design-build project, the design integration manager must organize and manage the activities of many individuals to conceptualize and develop the project design.**

In federal design-build projects, the role of the design integration manager spans five distinct phases:



PROPOSAL/PRE-AWARD PHASE



POST-AWARD PHASE



EARLY DESIGN PHASE



DETAILED DESIGN PHASE



CONSTRUCTION PHASE



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