A DESIGN-BUILD INSTITUTE OF AMERICA PUBLICATION

THE ROLE OF THE OWNER ADVISOR IN DESIGN-BUILD

A Design-Build Done Right® Primer

THE ROLE OF OWNER ADVISOR IN DESIGN-BUILD

Introduction

This document serves as an advisory guide for Owners considering the engagement of an Owner Advisor in either a Best Value Design-Build or Progressive Design-Build (PDB) procurement. The information provided here will help align the needs and interests of the Owner with the selection and scope of the Owner Advisor.

This primer is arranged in four parts:

- **Section 1** provides the definition of an Owner Advisor and an Owner of Choice. It outlines how a qualified Owner Advisor can help an Owner become an Owner of Choice.
- **Section 2** discusses the process for engaging an Owner Advisor, the scope of work an Owner Advisor may provide and how an Owner Advisor is compensated for services.
- **Section 3** explains how the Owner Advisor supports the Owner and the entire integrated Design-Build Team during the planning, procurement, contracting and execution phases of design-build projects. This section is organized to complement the Design-Build Done Right® Best Practices which are the cornerstone of all successful design-build projects. The universally applicable best practices set the standard for design-build broadly, with sector-specific Best Practices offering crucial insights unique to each market sector. The Best Practices are organized into three primary sections:

  I. Procuring Design-Build Services
  II. Contracting for Design-Build Services
  III. Executing Design-Build Projects

  Each of the primary sections contains principles that represent the "Best Practice" which are supplemented by "Implementing Techniques" that provide guidance on specific ways to implement the best practice. The combination of the Best Practices and the Implementing Techniques are the basis for Design-Build Done Right®. Implementing these practices on any type of design-build project exponentially increases the probability of success.
- **Section 4** contains a recommended list of available resources.

Background

The role of the Owner Advisor arose as Owners began to utilize integrated design-build project delivery in response to increasing project complexities and contractual obligations required on many projects. To leverage the unique characteristics of design-build to their fullest potential, the role of the Owner Advisor requires an individual or team that possesses the leadership, technical and facilitative skills necessary to orient the entire project team around the "One Team — One Goal" mentality which is essential for project success.

With the expanding use of design-build, three categories of Owners have emerged:

- **New to design-build:** These Owners have not yet participated in a design-build project and may have hesitancy due to a perceived lack of control over the process or results. It is essential that these Owners seek a qualified Owner Advisor to support the implementation of the Best Practices, setting them up for a successful project.
- **Experienced with design-build:** These Owners have completed one or more design-build projects using the Best Practices or have experience in one design-build procurement method (e.g., Best Value) and are using another procurement method (e.g., Progressive Design-Build). Their building program may be infrequent, or they are just starting to develop their design-build program. They do not have the institutional knowledge to implement the Best Practices consistently. These Owners should seek out a qualified Owner Advisor to support a successful project.
- **Extensive design-build programs:** These Owners have capital programs that regularly utilize design-build. They have some Owner Advisor capability and some capacity to perform that role within their organization. These Owners may continue working with a third-party Owner Advisor to bring broader experience to bear on their project or program, and supplement Owner capacity or capability in whole or in part. Owners who possess the required capability and have the capacity amongst personnel may choose to perform the entirety of the Owner Advisor role with internal personnel.

This Primer is suitable for all three categories of Owners. The basic assumption in this document is that the Owner Advisor is an external third-party to the Owner. This information is intended to help Owners understand what services an Owner Advisor can provide, how to procure an Owner Advisor, and how the Owner Advisor will interact with the entire project team.

Most of this Primer assumes the decision has been made to use design-build but also refers to activities and services that occur prior to the critical decision on project delivery method. The Owner Advisor is neutral concerning project delivery method until that critical decision is made. Prior to project delivery method selection, the Owner Advisor supports the Owner in selecting the most appropriate project delivery method for the project and Owner.

Evolution of the Owner Advisor

The term Owner Advisor is evolving out of the re-evaluation of this role within the design-build delivery methodology. Traditional contracting methodologies focused solely on contract compliance. With the trajectory of design-build, and the popularity of PDB, evaluating the program or project tone is now the emphasis. This requires a shift in philosophy and culture. Owners should be intentional in evaluating this tone through a different lens. This has led many Owners to value facilitative support more highly than protective support. A facilitative Owner Advisor focuses on preparing the project for success, removing obstacles, applying specificity to facilitation and supporting all stakeholders. Owner Advisors are also adept at creating facilitating environments and monitoring team culture.

While this document is primarily oriented to the design-build project, Owner Advisors can also be engaged at the program level when needed. These program-level services can support Owners with financing advice, contracting strategies, marketplace positioning, marketing strategies and consulting services not related to a specific project.

1. DEFINITION OF AN OWNER ADVISOR

An Owner Advisor is an individual or team of individuals that provide various services on a design-build project. The Owner Advisor should not duplicate elements of the Design-Builder responsibilities. Rather, the Owner Advisor's primary focus is on facilitating the goals of the project to performance compliance and project success.

The term Owner Advisor is both singular and plural. The Owner Advisor, when consisting of a team of individuals, is typically led by a single individual or a few individuals who most closely possess the characteristics identified in this document.

Owner Assessment

The selection of the right Owner Advisor is as critical to project success as the selection of the right Design-Build Team. An Owner needs to make a careful and thoughtful assessment of the type and extent of Owner Advisor services required using the Best Practices, this document and other resources such as those mentioned in Section 4. This assessment will guide the Owner's decision to procure an Owner Advisor. It is important that an Owner understands their internal capacity and capabilities to perform a portion, or all, of the scope of services needed for the project. Only then can an Owner determine what portion, if any, of the scope of services can be performed with internal personnel and what portion the Owner Advisor should be engaged to provide. Qualified Owner Advisors are well-suited to support Owners in this assessment and scope assignment.

Additionally, procuring an Owner Advisor allows the Owner to focus on its core business, knowing that its interests are addressed throughout the project.

1.1 WHY THE USE OF AN OWNER ADVISOR IS IMPORTANT

The Owner Advisor is instrumental in developing collaborative project delivery strategies to deliver desired design-build project outcomes. The Owner Advisor serves as an extension of the Owner's staff and embodies the technical, facilitative and leadership skills necessary for design-build project success. A key role of the Owner Advisor is to align the delivery process with critical needs and timely decision-making.

Owners may engage an Owner Advisor to support the analysis and selection of a delivery method and procurement approach (i.e., design-build, CMAR, CM/GC, design/bid/build, etc.). Determining the optimal approach for a specific Owner and project requires a broad understanding of various delivery methods and a commitment to a balanced evaluation of Owner considerations and goals of conventional delivery versus collaborative methodologies.

Determining the project delivery method is one of the most important decisions made by every Owner considering a construction project. Project drivers and Owner culture impact the success of a project delivery method and project outcomes, accordingly early engagement of the Owner Advisor is advisable.

It is important that the Owner Advisor embrace the core values of the Owner, such as collaboration, inclusion, sustainability, customer focus, safety, quality, etc.

1.2 LEVERAGE AN OWNER ADVISOR TO BECOME AN OWNER OF CHOICE

The Owner Advisor serves without any material, perceived or actual conflict of interest that has not been disclosed and waived. The Owner Advisor can guide the process of assessing project delivery methods. The Owner Advisor, or Owner Advisor team leadership, serves as the single point of contact for the Owner team within a specific level of authority set by the Owner. The Owner Advisor aligns the entire project team with the Owner's priorities throughout the project.

An Owner Advisor should be leveraged to help an Owner become an Owner of Choice. Owners must understand that their commitment to implementing the Best Practices attracts premier Design-Builders to their project. Becoming an Owner of Choice significantly increases the chances of attracting the attention of desired Design-Builders.

Defining Owner of Choice

An Owner of Choice is an Owner who has made the mental shift necessary to engage in collaborative design-build delivery and commits to the following on every project:

- Conducting a fair and impartial procurement
- Assigning risk to the party most able to mitigate
- Establishing and disclosing a realistic budget and scope
- Using performance-based requirements
- Remaining engaged in all stages of the project
- Making timely decisions
- Fostering an environment of collaboration
- Remaining flexible and embracing innovation
- Identifying clear project vision and goals
- Limiting proposal deliverables
- Being transparent
- Educating personnel in design-build

For additional information on each of these commitments, refer to the Best Practices.

1.3 CONDUCTING AN OWNER ASSESSMENT

Owners must conduct a proactive and balanced assessment of the unique characteristics of its program/project and its organization before deciding to use design-build. In some instances, Owners do not have the internal capacity or capability to conduct such an assessment and will rely on the Owner Advisor for guidance.

A key to successful projects is a well-conceived process that allows Owners to evaluate their choices and to select the best design and construction delivery approaches. This is accomplished through carefully and intelligently prepared evaluation criteria that reflect the Owner's project objectives and challenges.

Section 4, Resources contains a link to the Building Owner Assessment Tool (BOAT) which helps Owners understand their culture and its ramifications on project delivery method selection. Additionally, DBIA has a downloadable Owner Readiness Assessment which is intended to help Owners understand how prepared they are to engage in a design-build project. These two tools together can assist Owners and Owner Advisors understand their level of preparedness for design-build or where added training and education is needed.

1.4 QUALIFICATIONS OF AN OWNER ADVISOR

The many variations of design-build require that an Owner Advisor understands fundamental principles and the Best Practices of all aspects of project delivery and procurement from the perspective of both the Owner and the Design-Builder.

Understanding that each Owner — and each project — is unique, this document contains broad, overarching principles that every Owner should consider in the selection of an Owner Advisor. The level of capability and capacity within the Owner organization are driving factors, as is an organizational culture that supports collaboration and teamwork, which are hallmarks of successful design-build.

It is paramount that an Owner Advisor possess education and relevant experience with the implementation of the Best Practices during all phases of the project and possess skills in the following three areas critical to project success.

Leadership and Team-Building Skills

Leadership skills are essential for the Owner Advisor to implement thoughtful strategies that create and maintain a cohesive team environment to achieve project goals. A great resource to gain appropriate leadership skills for design-build is the DBIA Professional Certification and the DBIA Collaborative Delivery Leadership Academy. This six-module course is specifically designed to impart leadership skills across every member of the Design-Build Team.

Among the most valuable leadership skills are the ability to lead by example, delegate, inspire, communicate effectively and the ability to:

- Establish a vision and motivate others using critical success factors and or aspirational goals
- Identify, manage and foster healthy and collaborative relationships
- Constructively use emotional intelligence to guide communications, relationships and the decision-making process
- Foster an environment of trust and collaboration
- Facilitate Diversity, Equity and Inclusion (DEI) principles within the project team
- Bring an outside perspective from other successful projects
- Support a facilitative formal, structured partnering approach to identify and resolve issues at the appropriate level
- Help the Owner promote and build one team (One Team — One Goal) that understands the importance of the project to stakeholders
- Guide and facilitate consensus with all stakeholders
- Advocate for the project to all parties
- Recognize and address any potential conflicts of interest
- Carry out duties with integrity

Technical Skills

When selecting an Owner Advisor, Owners should carefully consider the Owner Advisor key personnel's credentials, educational background and relevant past performance in design-build, including a review of licenses and credentials that support a commitment to effective project delivery and lifelong learning. The selected Owner Advisor should be a DBIA Professional with expertise in application of the Best Practices and be in good standing on credential maintenance continuing education requirements.

The Owner Advisor must have proven experience in design-build procurement,

contracting and execution that includes an in-depth understanding and knowledge of:

Procurement:

- Required policies, processes and procedures in support of all procurement methodologies, including local, state and federal statutory and regulatory requirements
- Appropriate risk allocation and management
- Scope definition and development
- Implementation of the Best Practices
- Sustainability strategies, applications and third-party rating systems
- Knowledge of project delivery such as:
  - » Project control systems (schedule, quality, budget, underutilized business enterprises [UBE] engagement, etc.)
  - » The ability to assist the Owner with:
    - Attracting, selecting and assembling the right team
    - RFQ, RFP and contract development
    - Qualifications-based (QBS) and Best Value (BVS) source selection
  - » Market conditions and practices to promote a competitive field
  - » Innovation as an outcome of effective design-build

Contracting:

- Statutes and regulatory requirements
- Sureties and bonding requirements
- Thorough understanding of contracting for different project delivery models and contract language
- Insurance requirements
- Contract administration including payments and contract modifications

Execution:

- Knowledge and experience on:
  - » Monitoring project controls
  - » Project governance, structured partnering and facilitation
  - » Substantiation/verification of contractual obligations
  - » Stewardship of project interests (scope, cost, schedule, UBE engagement, etc.)
  - » Design, sustainability, resiliency
  - » Project management information systems, technology and tools (VDC/BIM, etc.)
  - » Oversight of the quality standards and the Best Practices
  - » Safety requirements and policies
  - » Construction administration
  - » Applicable industry and building codes, including ADA compliance, where applicable
  - » Environmental restrictions and concerns
  - » Impact of third-party stakeholders (regulatory agencies, utility companies, municipalities, etc.) and Owner risk mitigation strategies
  - » Market sector specific requirements, as applicable (e.g., in transportation sector, familiarity with NEPA, NPDES permitting, right-of-way acquisition, easements, etc.)
  - » Risk allocation and management
  - » Closeout and turnover processes and requirements

Facilitative Skills

Facilitative skills combined with leadership skills result in a "Facilitative Leader." Among the most critical facilitative skills for an Owner Advisor are the ability to:

- Use active listening skills
- Encourage and generate participative discussion in groups (structured partnering, collaboration, etc.)
- Stimulate creative thinking through brainstorming/other idea-generation processes
- Stimulate strategic consideration of alternatives and informed decision-making of appropriate choices
- Manage contrasting perspectives
- Facilitate inclusive group processes that honor diverse learning styles
- Help shape more powerful and strategic questions for exploration
- Gather and organize information to maintain the single source of truth for all parties relative to project status

With honed facilitative skills the Owner Advisor demonstrates the ability to coordinate, guide and facilitate:

- Team building and alignment of Owner's objectives and expectations
- Procurement process
- Agency reviews (zoning, Fire Marshal, building permits, EPA, local storm water requirements, state funding agencies, state natural resource agencies, State Historic Preservation Office (SHPO), regulated and contaminated waste regulations, etc.)
- Various design and construction execution activities

The many variations of design-build require that an Owner Advisor understands fundamental principles and the Best Practices of all aspects of project delivery and procurement from the perspective of both the Owner and the Design-Builder.

2. PROCURING THE OWNER ADVISOR

DBIA offers resources and a model contract to support Owners in the procurement of an Owner Advisor.

2.1 WHEN TO ONBOARD THE OWNER ADVISOR

An Owner Advisor can facilitate the Owner's decision-making process in selecting the project delivery system and procurement approach. Therefore, the Owner Advisor should be onboarded as early as possible.

An Owner Advisor can guide the Owner to thoroughly consider the procurement issues and support making strategic decisions as to how to take full advantage of the many benefits that are inherent in design-build.

2.2 PROCUREMENT PROCESS

Owner Advisor services are considered professional services and are covered under the Federal Brooks Act (and various state qualifications-based regulations for acquiring professional services), which supports selection based primarily on qualification(s) evaluation factors. Legislation and regulatory framework awareness are also factors to consider in the Owner Advisor procurement process.

2.3 POSSIBLE SCOPE OF WORK

In general, Owner Advisor services vary from initial front-end planning and permitting to developing procurement documents to project oversight and management during design and construction to commissioning and project closeout, and may extend into occupancy.

The Owner Advisor works with the Owner to customize services to match project requirements and the Owner's needs most effectively, resulting in a scope of services tailored to provide specific services to supplement the Owner's capability and capacity.

Refer to DB501 Standard Form of Contract for Design-Build Owner Advisor Services for a robust, but not exhaustive, list of services in Exhibit A. Owner Advisor services outlined in DB501 are addressed in various phases, each of which have two main categories as applicable: Base Services and Additional Services. The phases include:

- Project Delivery Strategy Phase
- Procurement Phase
- Validation/Preliminary Design Phase (Progressive Design-Build)
- Design and Construction Phase
- Warranty Period

Regardless of the services utilized, the engagement of a qualified Owner Advisor with proven past performance specific to the project and Owner needs is critical to project success. When performed effectively, Owner Advisor services can create great value for the project and the team. Conversely, when such services are not performed effectively, value can be significantly diminished and desired project outcomes undermined.

2.4 HOW THE OWNER ADVISOR IS COMPENSATED

The Owner Advisor is typically compensated as a consultant providing professional services. Various contracting mechanisms can be used, including lump sum, time and materials, fixed fee or a combination thereof. These mechanisms can be employed and modified as needed to accommodate the Owner's specific needs.

The fee range varies according to the scope of services and level of expertise of the Owner Advisor and can be estimated according to the base services and additional services.

3. SUPPORTING THE DESIGN-BUILD PROJECT

The role of the Owner Advisor in a collaborative and inclusive delivery environment holds a unique position throughout the project lifecycle. The scope of services focuses on the strategy, tactics and implementation of a successful delivery project.

3.1 GUIDING PRINCIPLES

The Guiding Principles outlined in the Best Practices are universally applicable to all members of the project team and underpin each best practice and implementing technique. The Owner Advisor assists the Owner in maintaining and enforcing ethical conduct across the team throughout project execution. Additionally, the Owner Advisor supports the Owner in selecting teams based in part on demonstrated competence, past performance, sustainable professional development programs, and Owner specific goals such as diversity, equity and inclusion engagement.

3.2 PROCURING DESIGN-BUILD SERVICES

The applications of Best Practices are the foundation of the project procurement process. The applications of the Best Practices are sometimes modified due to Owner requirements and limitations, emphasizing the need for a qualified Owner Advisor who can help minimize bid protests that delay projects. Underlying challenges include uncertainty by many Owners as to how to prepare the performance-based requirements and substantiation metrics necessary to optimize the many advantages of design-build.

The Owner Advisor supports the Owner initially by engaging in planning for the project delivery that may include participating in an Owner assessment and project delivery analysis to determine which project delivery method best suits the Owner and project. The Owner Advisor assists the Owner with identification of stakeholders and offers suggestions for additional design-build training that may help strengthen knowledge in specific areas. Additionally, the Owner Advisor participates in market research to assess current conditions, helps identify risks and opportunities for the project, documents procurement restraints and applicable conflict-of-interest policies, and gains an understanding of expectations relative to project closeout activities. When applicable, the Owner Advisor also supports the Owner with front-end due diligence tasks such as surveys, geotechnical studies, preliminary design, environmental approvals, etc.

The Owner Advisor assists the Owner with writing the Design-Build Oriented Procurement Plan. This plan reflects the reasons design-build was selected for the project and guides the procurement process. The plan memorializes the following commitments:

- Use of a qualifications-focused procurement
- Use of an appropriate form of agreement
- Engagement of a fair, balanced risk assignment
- Required identification of key trades and their early engagement during the procurement process
- UBE goals and objectives
- Commitment to disclose the project budget
- Use of performance-based requirements in procurement documents

- Definition of an achievable budget and schedule
- Use of stipends that appropriately align with the effort required to produce required deliverables
- Performance incentives
- Limiting deliverables
- Conducting confidential meetings and protecting intellectual property
- Engaging an appropriate evaluation team that remains unbiased
- Briefing of the source selection official
- Debriefings with unsuccessful Design-Builders

The Owner Advisor assists the Owner in defining the ideal Design-Build Team for the project during the procurement phase and builds relationships with potential Design-Builders to gain interest in the project prior to issuance of the RFQ or RFP. The Owner Advisor reviews various procurement documents for clarity and conciseness to elicit an effective response from the competitive Design-Builders.

Best Value Design-Build Procurement Considerations

When engaging a Best Value Design-Build procurement using a two-step process, the Owner Advisor supports the Owner by guiding the development of the Phase 1 RFQ that emphasizes past performance, overseeing the shortlisting process, developing the Phase 2 RFP that reflects the best practices in which non-cost evaluation factors are significantly more important than price, and establishing that technical proposals are evaluated before price proposals.

Progressive Design-Build Procurement Considerations

When engaging a Progressive Design-Build procurement, the Owner Advisor supports the Owner by supporting the assessment of Owner capability in defining requirements, conducting the primarily qualifications-based selection process, emphasizing past performance/experience, defining the collaborative multi-phase services required for the project including validation, preliminary design and final design and construction, defining the timing and prerequisites for the delayed price commitment, appropriate cost element to be considered and evaluated, and defining the off-ramp and procedures for engaging the off-ramp if necessary.

3.3 CONTRACTING FOR DESIGN-BUILD SERVICES

Effective design-build contracts are written to address award fees and incentives to promote cooperation, teamwork and collaboration throughout the post-award phase of the project. Combined with the constructive use of performance-based requirements, these contracts effectuate the contracting parties to achieve better outcomes and success.

DBIA has developed contract document forms as models to guide the parties forming the agreement. The parties involved are responsible for selecting the specific documents to serve the project's intent. A list of other contract documents is presented for reference in Section 4.

An Owner Advisor assists the Owner in selecting the optimal contract for the project and supports contract language that reflects the unique characteristics of Design-Build Done Right®. The Owner Advisor, unless licensed to perform legal services, provides commercial advice and not professional legal advice. All contracts should be reviewed by the Owner's legal counsel.

Design-Build Contracts

The Owner Advisor supports the Owner in utilizing contracts that reflect the unique characteristics of Design-Build Done Right®.

DBIA has regularly evaluated the needs of Owners, Design-Builders and other parties involved in the design-build process and developed standard contract forms to guide the Best Practices in the industry. A balanced approach to risk management that considers the legitimate interests of all parties to the design-build process is promulgated. The risks are allocated to the party best equipped to manage and mitigate such risk to promote the best design-build practices.

Owner | Design-Builder Agreement

DBIA Form 525 — Standard Form of Agreement Between Owner and Design-Builder (Lump Sum) should be used when the parties intend that the Owner compensates the Design-Builder lump sum fixed-price for the completion of all design and construction services. A lump sum budget based on the Owner's project criteria engenders greater mutual understanding and cooperation between the parties.

If there is uncertainty about the Owner's project criteria, a cost-plus/guaranteed maximum price (GMP) contracting approach may be more suitable using the DBIA Form 530 — Standard Form of Agreement Between Owner and Design-Builder (Cost Plus Fee with an Option for a Guaranteed Maximum Price).

Design-Builder | Team Member Subcontracts

The Owner Advisor encourages the use of appropriate contracts within the Design-Build Team. DBIA Form 565 — Standard Form of Agreement Between Design-Builder and Design-Build Subcontractor (Lump Sum) governs the relationship between the team members and establishes the relationship between the prime Design-Builder and the subcontractors. The agreement provides the framework for assigning roles and responsibilities concerning the project itself and specifically addresses the unique characteristics of design-build.

3.4 EXECUTING DESIGN-BUILD PROJECTS

The Right People

During execution, the Owner Advisor supports the Owner in monitoring team cohesion using soft skills to focus the Design-Build Team around project goals and objectives. As an extension of the Owner's team, the Owner Advisor will review team member changes as they may occur.

The Right Tools

An Owner Advisor encourages transparency through the utilization of technology and collaborative systems that enhance collaboration and promote team cohesion. The following is a partial list of possible systems:

- Online document repositories
- Collaborative meeting systems
- Scheduling software and contractor tracking systems to verify progress and critical path execution
- Estimating and contracting systems
- Invoicing and pay estimate systems that verify work performed and pay promptly
- Quality control systems that facilitate quality assurance and quality control for both design and quality control for construction activities
- Systems for managing substantiation of performance requirements

Exemplary Communications

Successful project delivery is realized through team integration and cohesion. Accordingly, the members of the Design-Build Team must engage in open and honest communication. The Owner Advisor monitors communication and uses soft skills to realign the project team around communication protocols and embodies the collaborative nature of design-build. The Owner Advisor monitors the timeliness of the Owner and Design-Builder decision-making and assists the Owner in removing roadblocks.

Design Management

The contract should define substantiation and construction submittals to be provided to the Owner. The Owner Advisor supports substantiation of design and construction and manages the logistics of the submittal process. The Owner Advisor verifies applicable reviews of substantiation items and submittals are completed and comments made are within the scope of the contract documents. Finally, the Owner Advisor verifies the Owner comments are incorporated in the project.

Commissioning and Turnover

The Owner Advisor oversees commissioning and project closeout. This may involve coordinating commissioning activities, setting up final inspections, verifying all documentation is received (including warranties and testing records), training has been coordinated and the processing of the final pay application has been completed.

Successful project delivery is realized through team integration and cohesion. Accordingly, the members of the Design-Build Team must engage in open and honest communication.

4. RESOURCES

A partial list of resources available is below. For a more comprehensive list of resources, visit the online DBIA Bookstore.

PRIMERS AND DOCUMENTS

- DBIA Universally Applicable Best Practices (and additional sector-specific Best Practices)
- Choosing a Project Delivery Method
- DBIA Code of Professional Conduct
- DBIA Manual of Practice
- Deeper Dive — Progressive Design-Build
- DBIA Position Statement: Public-Private Partnerships (P3)
- DBIA Position Statement: Use of Stipends

CONTRACTS

- Request for Qualifications, Request for Proposals, RFQ/RFP Guide and Supporting Documents
- DBIA Form 501 — Standard Form of Contract for Design-Build Owner Advisor Services
- DBIA Form 525 — Standard Form of Agreement Between Owner and Design-Builder (Lump Sum)
- DBIA Form 530 — Standard Form of Agreement Between Owner and Design-Builder (Cost Plus Fee with an Option for a Guaranteed Maximum Price)
- DBIA Form 544 — Progressive Design-Build Agreement
- DBIA Form 565 — Standard Form of Agreement Between Design-Builder and Design-Build Subcontractor (Lump Sum)
- DBIA E-DEI — Diversity, Equity & Inclusion Example Provisions

> DBIA has regularly evaluated the needs of Owners, Design-Builders and other parties involved in the design-build process and developed standard contract forms to guide the Best Practices in the industry.

DBIA offers a broad range of educational resources and tools to provide more guidance on Design-Build Done Right®. Visit DBIA's online Learning Center for more information.

FULL AND MULTI-DAY EDUCATION COURSES

- Selecting and Using an Owner Advisor in Design-Build (full day)
- Design-Build Certification Workshop (3 days):
  - Day 1: Setting the Stage for Design-Build Success
  - Day 2: Collaborating for Exceptional Outcomes
  - Day 3: Contracts and Risk Management
- Developing an Acquisition Strategy
- Owners Series (3 days):
  - Day 1: Super-Charged Source Selection
  - Day 2: Performance Requirements: The Key to Effective RFPs
  - Day 3: High Performance Contracting
- Progressive Design-Build Done Right (full day)
- Design Management in Design-Build (full day)
- Company-Based (in-house) Training: Allowing you to cost-effectively train groups of people within your organization or firm
- And much more

DESIGN-BUILD DELIVERS WEBINARS

- Design-Build Done Right® Owner Readiness for Design-Build
- Elevating Design-Build Done Right® Leadership
- Procuring the Design-Build Team
- Rising to the Challenge: Design-Build's Role in Crisis Recovery

TOOLS

- Owner Readiness Assessment Tool
- Charles Pankow Foundation, Building Owner Assessment Tool (BOAT)

For case studies and photos of award-winning projects using design-build best practices, visit our project database at projects.dbia.org.

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